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SOCIALITES

We can change the development business model by making social games, says Emote's Morgan O'Rahilly and David Rose

WITH THIS ISSUE

develop100

Ranking the world's most successful games studios

INSIDE ▸ DEVELOP AWARDS 08 GUIDE • CHANNEL 4 GETS IN THE GAME • TOOLS NEWS & MORE

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morpheme is the industry's first graphically authorable animation engine. morpheme consists of morpheme:runtime: an advanced runtime animation engine for PLAYSTATION®3, Xbox 360™, Wii™ and PC. morpheme:connect: a highly-customizable 3D authoring application.

morpheme gives animators and developers unprecedented control over the look and feel of their animations in-game: blends, transitions, compression, etc. can all be previewed and modified graphically in morpheme:connect and live on the target platform.

morpheme:runtime ships with full source code and integrates seamlessly with euphoria, NaturalMotion's Dynamic Motion Synthesis technology.

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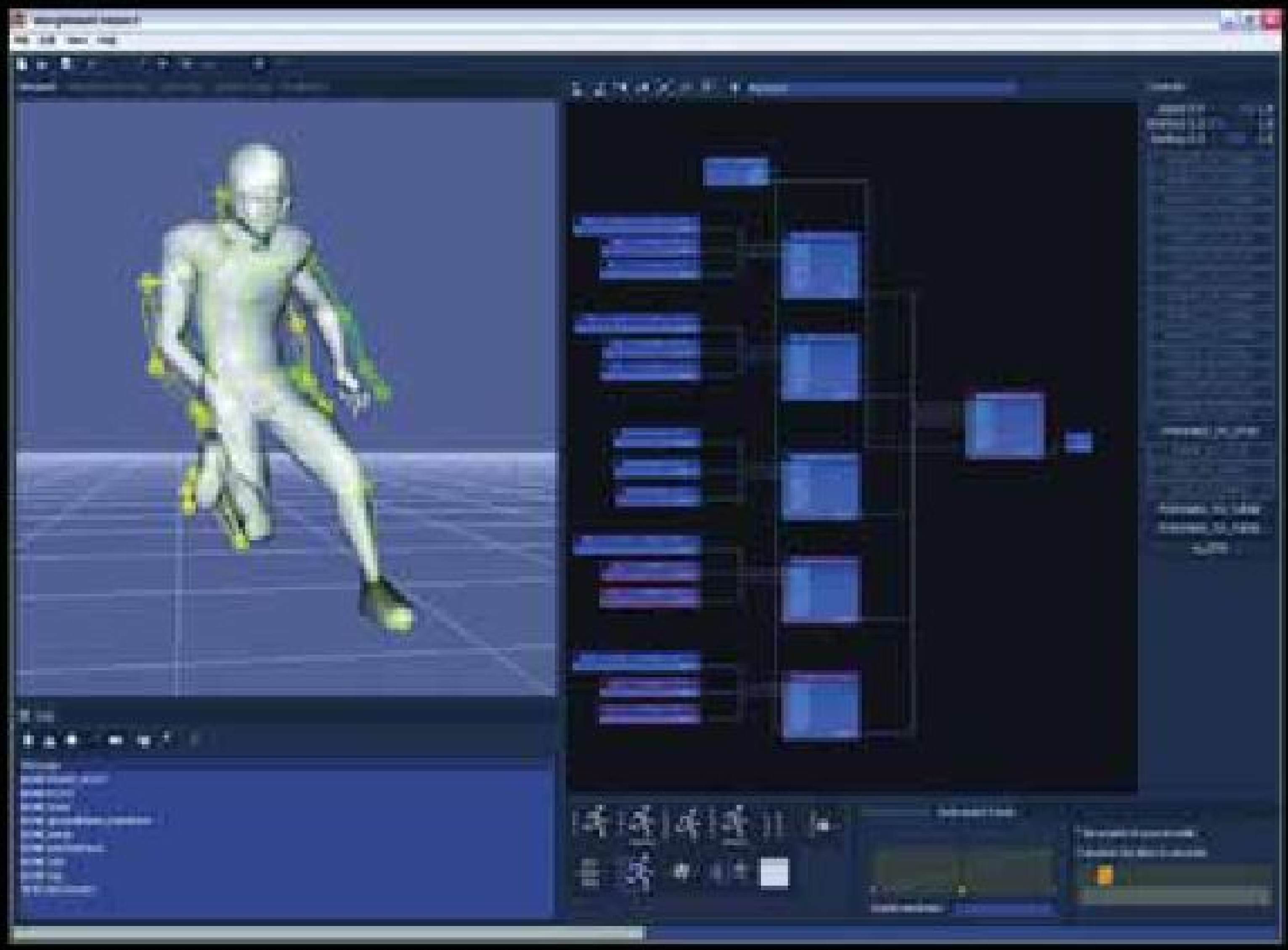
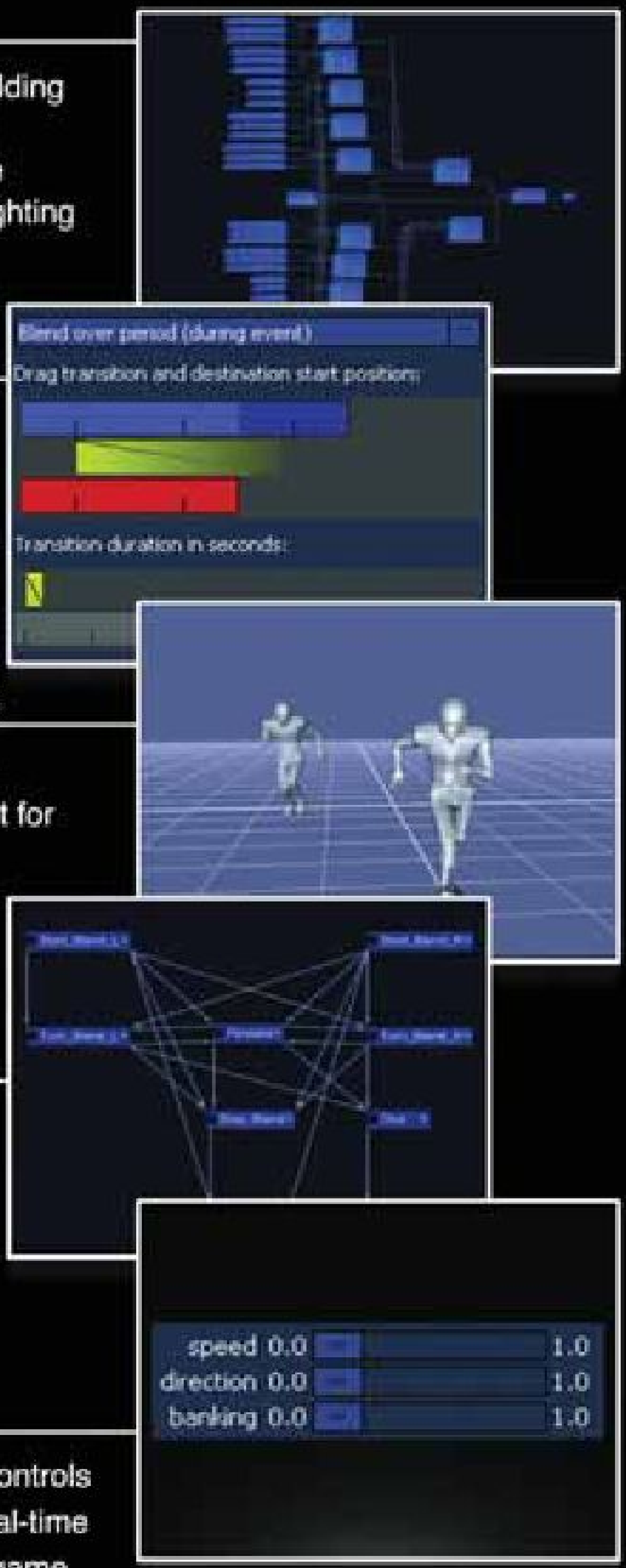




Blend over period (during event)
Drag transition and destination start position:
Transition duration in seconds:
speed 0.0 1.0
direction 0.0 1.0
banking 0.0 1.0

blend tree

Advanced graphical tools for building complex blend trees. Real-time visualization of animation source contribution through node highlighting

blending

Graphical control of transition blending between states in the transition graph

multiple characters

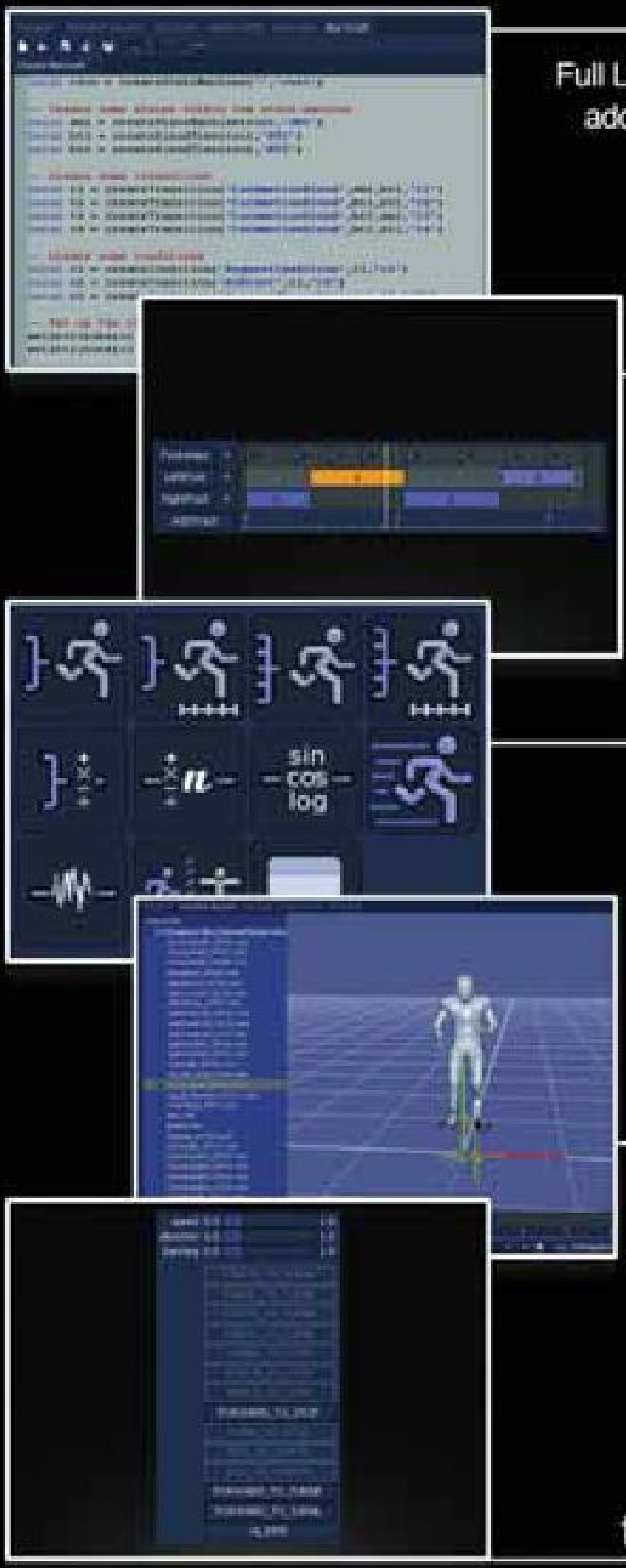
Visualization of multiple runtime characters in morpheme:connect for easy authoring and analysis of character interaction

network

Advanced graphical tools for creating and visualizing transition networks through drag-and-drop

control parameters

Exposure of custom high-level controls for entire animation system. Real-time manipulation through sliders or game pad controller



scripting

Full Lua scripting for automating tasks, adding AI logic or polling game pads for real-time input

timeline

Graphical mark up of animation data to add one-shot and duration events, for highlighting footfalls, sound effects, etc.

node palette

Advanced blend notes (time-warp) for dragging and dropping into transition network. Fully customizable node types through C++ and scripting

animation browser

Easy browsing and selection (drag & drop) of source animation. Animation list is automatically updated to reflect changed source files (after editing in Maya)

transition requests

Exposure of custom transition messages. In-tool emulation of interaction between morpheme:runtime and game AI system

www.naturalmotion.com | contact@naturalmotion.com | © 2007 NaturalMotion | morpheme is a registered trademark of NaturalMotion

NATURALMOTION

WITH THIS ISSUE:
Develop 100
Named and numbered: the world's most successful games studios

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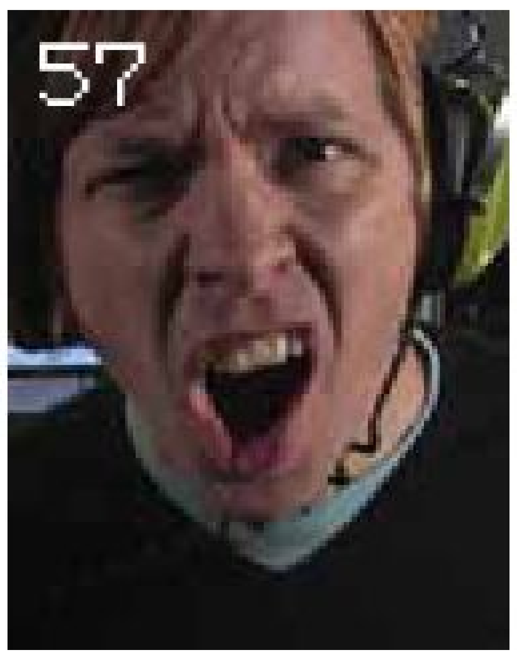

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THE INTERNATIONAL MONTHLY FOR GAMES PROGRAMMERS, ARTISTS, MUSICIANS AND PRODUCERS

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'Now *this* is convergence'

Channel 4 looks to exploit the games and broadcasting crossover via big-money backing of Dare to be Digital

by Michael French

Talent is the key to how big media companies can utilise and support the games industry – that's the key message coming from Channel 4 as it steps up to support the 2008 Dare to be Digital game development competition.

Earlier this month the UK TV broadcaster – which is publicly-owned, but commercially funded – announced it had partnered with Dare organiser the University of Abertay to help transform the event into 4Dare, taking the event to a wider national scale with a 'substantial' six-figure investment (*Developmag.com Newsflash, April 3rd*).

4Dare will challenge students across the UK to form teams of five and apply to participate in a ten-week residency where they develop a game from pitch to prototype. The scheme will run across host centres in Brighton, London, Cardiff, Dublin, Dundee and Birmingham (all UK) and Frankfurt (Germany), while tams from India and China are also invited to compete at the Dundee centre.

Channel 4 will contribute towards the funds needed to run the host centres, where the student teams stay and are paid during the ten weeks. It will also help pay for the Dare ProtoPlay events – which showcase the resulting games – taking place in Edinburgh and London this August and October respectively.

For both Abertay's 4Dare director Paul Durrant and Channel 4 chief executive Andy Duncan, the move recognises the increasing overlap between mediums – and how games development talent can play a major part in the evolution and education of the moving media. Durrant explained to Develop that Channel 4 is using its clout and public service remit to explore the games space.

"Channel 4 recognises the development of talent at a regional level – because of course they have a nations and regions remit. And on a public outreach level the showcase events are totally unique in games in the way it gets the public interacting with the prototypes," he said.

Channel 4 will also be setting an optional brief in the competition, entitled 'Learn about life'. The entering teams can, if they wish, choose to make a game that addresses new audiences and may provoke thought on a particular theme, if it's relevant, or explore moral or emotional themes. Durrant added that at this point the brief was so wide and optional so as to not constrain entrants – being more 'serious entertainment' rather than 'serious games.

Ultimately, he said, the point of Dare is to channel hopeful developers towards turning strong ideas into playable concepts that could in turn end up as viable pieces of entertainment; it will purely be a bonus if some of the games were a companion to the strand of Channel 4's television output which aims to tie into pertinent cultural themes as well as offer entertainment value.

Duncan announced that the Dare partnership – established when Channel 4 became a more modest sponsor of the event in 2007 – was to evolve in March, when he outlined the channel's 'Next on 4' initiative, part of which includes the 4IP £40m fund to develop all kinds of new intellectual digital properties, including games. Added Durrant: "The fact they have announced a fund of that scale shows they're interested in what you might say is 'non-traditional' broadcast content, but will include games. It shows the direction in which Channel 4 is going."

> ***"This shows the direction in which Channel 4 is going…"***
> ***Paul Durrant, Abertay's 4Dare director***

The Channel 4 boss Andy Duncan added: "Channel 4 is driven by innovation, talent and risk-taking and all of these are inherent in the Dare to be Digital competition.

"Video game design and production requires a fusion of art and science and 4Dare will bring together the top young talent from regional centres vital to the future of digital broadcasting in this area."

If you're a student or studio looking to enter or support Dare to be Digital, head to **www.daretobedigital.com**

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Editorial
Best of the best

Writing entries for the Develop 100 always proves to be an eye-opening affair. But this year, I don’t think many will be surprised that Nintendo has taken the number one slot – after 18 months of steamrollering sales of the DS and Wii it would have been more remarkable if its software teams in Kyoto *hadn’t* made it to the top of the pile.

What is surprising is that, while many of the studios listed in the book go past the 100-man mark (at least those who disclosed head counts – confirming the amount of employees working in games development still remains an intentional mystery for some studios), a good clutch of the big successes have been driven by smaller teams.

Brain Training is a case in point - the game has generated millions with a modest concept and an even more modest team. (Admittedly its handful of developers makes it a freak example as well.)

I asked a few people at GDC what they thought was more beneficial – 100 developers working for two years on a game or 200 working for one year; theoretically (at a basic level), the cost is virtually the same. There was no firm answer, but it was clear that the attraction to smaller teams is finding traction. Certainly, some of the games I am most interested in finding out more about and playing are those driven by smaller scale production methods, from *Boom Blox* and *Backbreaker* to *Lost Winds* or the projects masterminded by Emote.

Undoubtedly, I’m not the first to point the rise of smaller teams – in fact those games I mention above come from teams intentionally structured that way – but those eying the ‘small, but perfectly formed’ route should remember that small teams are also specialists. For instance, trying to cover every SKU has burnt fingers for a few studios in the past, be that trying to straddle handheld and console or making mobile games to compliment your ‘bigger’ ones.

Yes, building a small team a keeping it that way can provide fruitful gains – but only with focused and correctly managed vision.

Michael French
michael.french@intentmedia.co.uk

Michael.

Insomniac pushes the development

“Compete with content, not tech,” says developer of Ratchet and

by Ed Fear

The industry isn’t doing enough to share its technical knowledge, and the secretive attitude of some game studios needs to change – for its own good.

So says American independent studio Insomniac. The California-based firm recently kick-started its Nocturnal knowledge and technology sharing scheme, and now it wants other developers to do the same.

“People wonder why we’re doing this,” Insomniac’s engine director Mike Acton told us. “But contributing back to the industry has always been in the Insomniac philosophy. We’re all here standing on the shoulders of the giants that came before us, so we feel it’s our responsibility to give back.”

> ***“Let’s work together to make better games for everyone…”***
>
> ***Mike Acton, Insomniac***

Cynics would suggest that the only reason a studio would call for an end to the technology war would be so it could profit from the spoils, but Insomniac’s no slouch when it comes to graphically appealing games, having developed the likes of *Resistance* and *Ratchet & Clank*. Rather, it believes that there’s little sense in each developer struggling through the same problems and rewriting the same fundamental but time-consuming core routines, all the while wasting resources that could be directed elsewhere.

Currently included in the Nocturnal offer are common helper utilities such as smart pointers and a delegate/event system, an non-blocking inter-process communication API, a console logging manager, debugging helpers and a Perforce API wrapper – with a

for a cease-fire in technology war

Resistance as it launches plan to share engine secrets with the industry

Insomniac's Mike Acton (pictured above) believes that the company should share the lessons it's learnt on games like Ratchet & Clank

profiler and a C++ reflection system set to go online soon.

And it doesn't stop with code – Insomniac has also set up a R&D section of its website, which contains presentations, articles and resources based on the things Insomniac has learnt about PS3 development as it works on its third title on the notoriously-difficult platform.

But for all those worrying about revealing too much – of either their own practices or of the secrets of a platform – Acton said: "Naturally there are things we can't reveal because they're under NDA – for example, some of the lower level details of the RSX are not publicly known.

"In those cases we'll either cull those parts out of the presentations or create a generic version that's applicable to GPUs in general, so that other people can still get the idea and learn how the technique works without knowing the specifics. The same applies if it's something that we're not ready to reveal about our games – we'll handle it generically and can then fill in the context at a later date."

"Actually, Sony's been fantastic about it," commented Ryan Schneider, community manager at Insomniac. "Once we clarified our purpose and intent everybody was on board. As long as we're not revealing anything too sensitive about the proprietary Sony information, we're OK. And, as an independent studio, we're well within our realm to do so."

It's still early days for the project, but Insomniac hopes that the material base will continue to grow. But its real aim, rather than doing this to build up its own library of shared content, is to blaze a path for other studios to follow. "The ultimate aim is to get other developers to do the same thing – either with us through Nocturnal or on their own," Acton explained.

"What's important to get across is that this sort of thing – technology – isn't what we're competing on. Technology isn't our competitive edge. Let the games stand on their own, but let's share the technology. Let's share as much information as possible with each other and work together to make the better games for everybody." And if the studio behind some of the PS3's best titles isn't scared of sharing its secrets, there's arguably little reason for anyone else to not do the same.

nocturnal.insomniacgames.com

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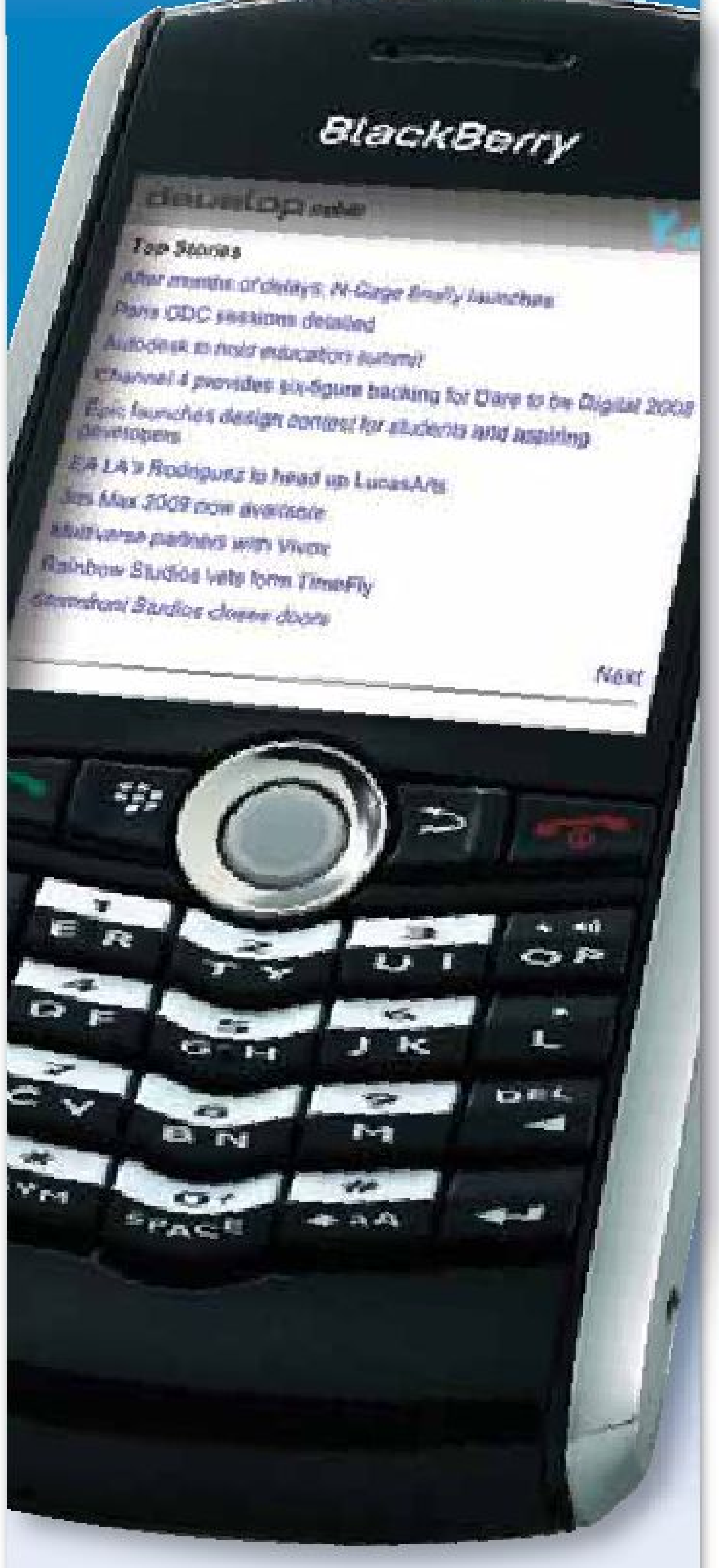

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WorldView

Our regular round up of development stories from across the globe…

//comments

Tiga boss Richard Wilson says studios shouldn't be the ones to fund the Byron Review's suggested awareness campaign.

"Developers already face intense competition from foreign government subsidised studios. The last thing they need is for the UK Government to impose additional costs on it…"

Never one to mince his words, Warren Spector offloads his problems with game narrative in an extensive interview on our website.

"When people say 'wasn't that cutscene cool?' I just want to scream. If every player is doing the exact same thing, it's not a game. Go make a movie and get out of my medium…"

N+ developer Metanet explains that, actually, it's not just Xbox Live Arcade that's 'full of shit'. Keep digging, guys…

"The larger rant is 'why do the majority of games totally suck ass?', which is a complex topic. Certainly, everybody is to blame – gamers, developers, publishers, press…"

LOS ANGELES, USA

Viacom launched a double assault on the industry this month, with both Paramount and Nickelodeon stepping up activity in the games space.

Paramount's first slate of games will be based on new film IP or its back catalogue of properties, with an emphasis on casual, handheld and mobile games.

The studio will pursue a variety of funding models to bring its games to market in 2008, and plans to be flexible in terms of publishing – either publishing its titles itself, co-publishing with other firms or simply funding development.

Nickelodeon, meanwhile, has started to flesh out the $100m casual games strategy it announced last year, saying it will develop a whopping 600 titles in the next few years.

The company says that it has 25m unique users already playing its online games and, according to Yahoo, will host its titles on sites that target pre-schoolers, tweens, teenage boys and parents.

www.viacom.com

ONTARIO, CANADA

Ontario's government has enhanced tax breaks for game production as part of its 2008 budget.

Firms in the province now have longer to take advantage of the Ontario Interactive Digital Media Tax Credit, which has been extended until 2012 for small companies. At the same time, larger firms can now benefit from 25 per cent rebate on fee-for-service work, up five per cent.

Plus, the region's Interactive Digital Media Fund will receive an additional $7million to help boost the number of games companies in the region.

www.interactiveontario.com

For global games development news as it breaks head to **WWW.DEVELOPMAG.COM**

bright light
an EA studio

GUILDFORD, UK

EA has officially revealed the new name of its UK-based casual games team.

Called EA Bright Light, the Guildford-based team shares its offices with *Burnout* developers Criterion Games, but is organisationally distant, sitting under under the EA Casual Entertainment label. It exists as a studio with a specific focus on young and family audiences and is lead by Harvey Elliot.

The studio has a long and enviable heritage, having created a number of key titles, including those enlisted through the acquisition of Bullfrog Productions in 1995 – specifically *Theme Park, Syndicate, Populous* and *Dungeon Keeper*. The *Harry Potter* team is also part of EA Bright Light.

The first Bright Light game was also unveiled, a music-action title for the Nintendo DS called *Zubo*.

"*Zubo* represents the culmination of a dedicated incubation project which specifically sought to develop a new video game property for boys and girls under 12," said Elliott.

"The team here has designed a rich, immersive and above all enjoyable experience – one that will live in the schoolyard, at home or on the move."

Expect to see more details on both *Zubo* and the team behind it in Develop next month.

www.ea.com

DUNDEE, SCOTLAND

Realtime Worlds has secured $50 million in financing according to website Tech Crunch.

This isn't the first time that the *Crackdown* developer has been active in securing financing – it accumulated $33 million in capital from NEA in December 2006, a move which saw two NEA representatives joining the studio's board of directors.

Realtime Worlds is currently working on the hotly-anticipated massively-multiplayer game *APB* in conjunction with Korean online giant Webzen.

www.realtimeworlds.com

KYOTO, JAPAN

The software sales have been counted, tallied and checked, and the results are in – for the first time ever, a Japanese developer has topped our yearly Develop 100 chart.

No prizes for guessing who it is, though: its stunning performance in not only UK retail but across the world has seen Nintendo rise to the top spot of our developer chart. It's also the first time that EA hasn't lead the pack. Want more delicious stats? Take a look at your copy bundled free with this issue of *Develop*, and check out our analysis on page 36.

www.nintendo.co.jp

GLOBAL REPORTS

JAPAN: CAPCOM NABS K2

Capcom has acquired K2, the Japanese studio behind the *Tenchu* series, in a deal that will see over 200,000 Capcom shares issued to K2's stakeholders.

In an official statement, Capcom said: "Upgrading development activities is essential to the company's growth strategy."

www.capcom.com

ISRAEL: SOUND SYNTHS

New start-up Audio Factory, founded by former SCEE audio project manager Philip Morris, has revealed that it is working on a technology to dynamically synthesise sound effects by using data from the graphics and physics engines to model sound interactions.

www.audiofactorysound.com

US: WHITEMOON DREAMS

R. Scott Campbell, lead concept and game designer on the seminal RPG *Fallout*, has co-founded new Pasadena, California-based studio WhiteMoon Dreams, with Looking Glass and EALA vet Jay Koottarappallil.

The team currently comprises of 11 people, all hard at work on a project with a currently-unnamed Japanese publisher.

www.whitemoondreams.com

UK: FOUNDATION 9

James North-Hearn, founder of Sheffield-based Sumo Digital, has risen to the role of CEO of the global indepdent 'superdeveloper' Foundation 9 Entertainment.

Former CEO Jon Goldman left having successfully established the company. "Our plan now is to hone ourselves into a really, really high quality developer," said North-Hearn.

www.f9e.com

US: RADAR GROUP

3D Realms co-founder Scott Miller has created a new IP incubator production house, Radar Group, which aims to help developers keep part ownership of their original IP. "We're something the industry desperately needs," said Miller.

www.radargroup.com

GERMANY: FISHLABS

Mobile developer Fishlabs has started to offer customers the choice of receiving its games via e-mail to customers, citing the high cost of over-the-air data transferral as a factor limiting the growth of the mobile games market.

www.fishlabs.net

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Highlights of the past month
from www.developmag.com

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'Xbox Live Arcade? It's full of shit games…'

Developers claim that Nintendo has been keenly capitalising on frustrations with Xbox Live Arcade to help drive the number of games produced for its WiiWare digital distribution platform.

According to *Developmag.com*'s sources, Nintendo has been actively briefing studios on what it says is the increased flexibility of WiiWare, from cheaper development through to more flexible pricing, and how this makes it a better service to make games for – painting a stark contrast to the likes of Xbox Live Arcade.

Microsoft recently halved the royalties paid for first-party Xbox Live Arcade from 70 per cent to 35 per cent on games that make under $4m in revenues (the rate rises closer to 50 per cent when the revenues go over that amount, *Develop* understands), and Nintendo has been keen to take advantage of the anger amongst studios over the changes, directing them towards its own platform instead.

"Nintendo has made it very clear to us that we'll not only be making a better royalty rate from WiiWare games, but we'll also have a better chance of selling games – the service won't be clogged up with the retro titles that have blighted the chances of many independent studios on Xbox Live Arcade," said one studio biz dev boss.

Added another WiiWare developer, added: "Frankly, we're not looking at making games for Xbox Live Arcade because the service is full of shit," he said, pointing towards the service's number of retro remakes.

UK Government 'declares trade war' on Canada

The UK's Ministry of Culture, Media and Sport has formally started an investigation into the legality of Canada's tax incentives for games studios.

A Department of Culture, Media and Sport (DCMS) spokesperson cofirmed that "the UK government is concerned that state aid offered to computer games companies by a number of federal institutions in Canada may not be compatible with World Trade Organization principles," and has opened a European Commission investigation into the country's subsidies to see if they contravene WTO rules.

The move follows months of outcry from UK studios that subsidies in Canada are creating unfair competition. According to information collated by trade association Tiga for its Playing for Keeps report last year, the UK slipped to the fourth in the listing of the world's biggest development countries, knocked down from third by Canada.

Tax incentives are available in a number of Canadian provinces. Manitoba has the most generous – companies can claim back up to 45 per cent of labour costs. Quebec is one of the busiest regions for games development in the country and provides a 37.5 per cent tax credit on wages, while Ontario offers a 30 per cent tax credit for small companies, and 20 per cent for those whose annual revenues are over $20m.

"Canada fully complies with its WTO obligations," said a Canadian Department of Foreign Affairs and International Trade spokesperson

COMMENTS

"Canada's tax breaks are more or less aligned with WTO policies. APOM and French government services had looked a few years ago at the opportunity to challenge Canada's incentives with WTO. Our conclusion was such a challenge would lead nowhere.

"The UK should join forces with France as well as other Euro countries in understanding the imperial need to save a key industry and convince the European Commission to widen its horizon on the subject and allow all games to benefit."
Guillaume de Fondaumière, head of French trade association APOM, discussing the UK Government's WTO action

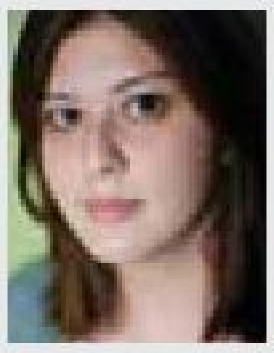
"Instead of answering outcry from developers in the UK regarding tax breaks with announcements or moves toward tax breaks… the UK government is trying to shut down tax breaks elsewhere? Is Labour doing that badly?"
John Kwag, also discussing the UK Government's announced WTO action

"I have not been able to do any work the last hour since seeing this. Fantastic bit of software."
Reader 'retox' after checking out our tip of OctaveEngine's 2D physics engine (www.octaveengine.com/casual/dltrial.html)

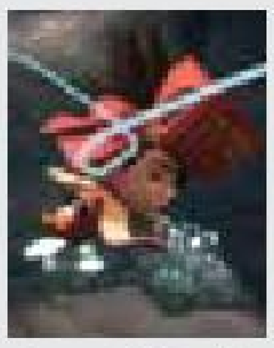
THIS MONTH'S FEATURES…

One Foot in the Game
For his very first trade interview, new Tiga CEO Richard Wilson turned to *Developmag.com* for the scoop. In a two-part Q&A we quizzed him on tax breaks and what developers need to do to improve the state of games education and management skills, amongst other things.
www.developmag.com/interviews/155/Trading-places-part-1

Q&A: Chris Satchell
The head of XNA gets a grilling from the *Develop* team in another two-parter. He answers questions about the newly-announced Xbox 360 Community Games initiative, why aspiring games developers can be trusted to police the content that goes up, and what's next for the homebrew gaming service.
www.developmag.com/interviews/136/QA-Chris-Satchell



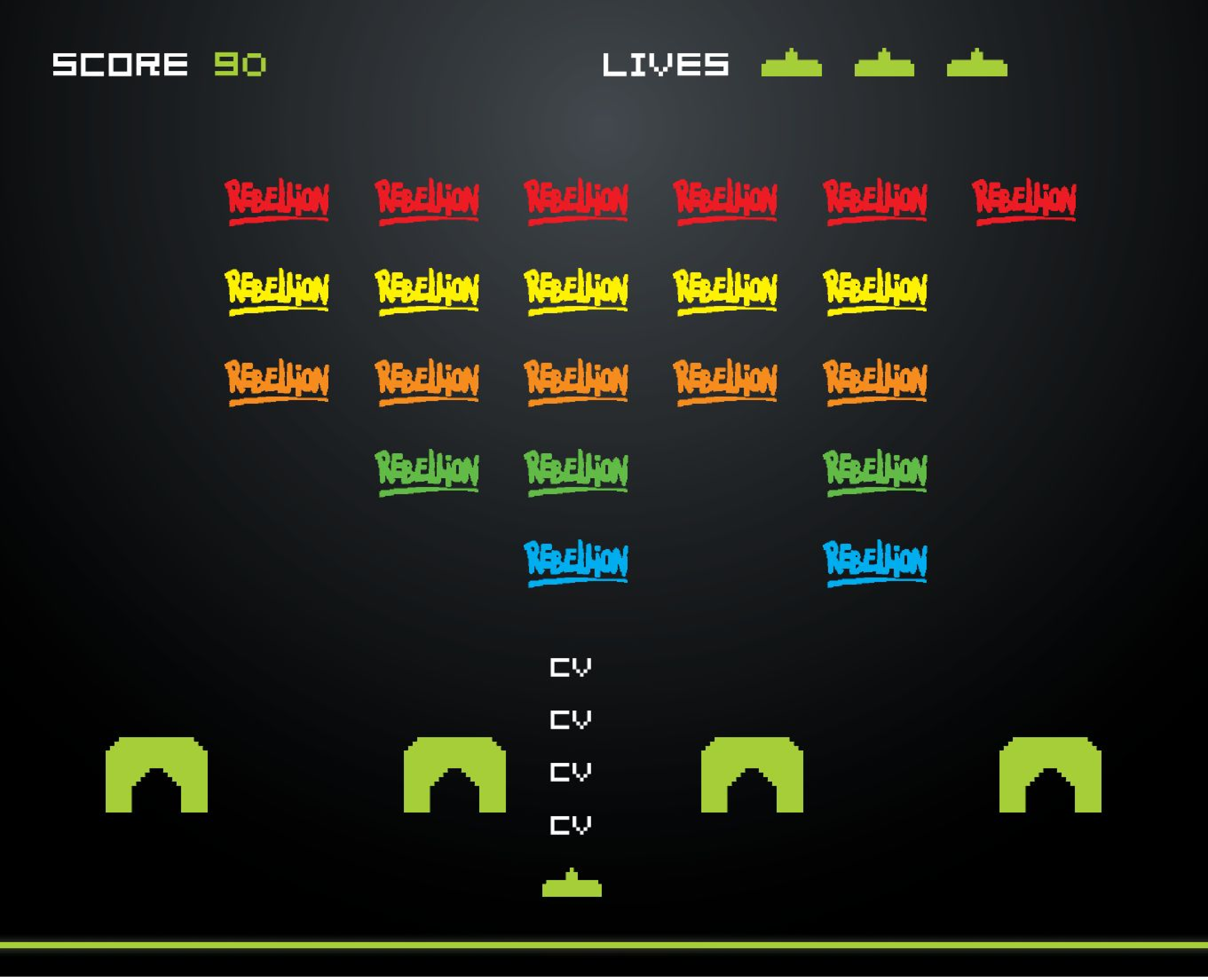
Student Union
That PC superdeveloper Valve hired a group of students to work on their own title was surprising enough news, but no-one could have imagined that the game they would make, *Portal*, would be many developers' pick of 2007. We caught up with Kim Swift to talk portals, education and companion cubes.
www.developmag.com/interviews/146/Student-Union



WiiWare Week
At the start of March, we ran a five-part series of articles looking at the potential and praise for Nintendo's new digital distribution service. We look at launch games *Lost Winds*, *Spogs Racing*, plus how Nintendo is trying to wind developers over to chosing Wii instead of Xbox Live Arcade.
www.developmag.com/news/29485/WiIWare-Week-Round-Up

Q&A: Warren Spector
Another of our in-depth two part interviews was with Deus Ex creator Warren Spector whose Junction Point studio is now part of Disney Interactive Studios. He sounds off on stories in games and game writers need to learn to write.
developmag.com/interviews/148/QA-Warren-Spector-Part-1

All of the above and more can be found at
www.developmag.com/interviews



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Gurus gun for Brighton

Plans build for July's Develop Conference and Expo in Brighton ● Over 1,200 attended 2007's event

The development industry will once again descend upon Brighton this summer

29-31 JULY 2008
Develop in Brighton
ONE COMMUNITY • ONE VOICE • ONE PLACE

The third annual Develop conference is set to be its biggest and most comprehensive so far, with key names from the global games industry set to descend on Brighton in July.

60 sessions across eight tracks running for three days will see over 90 games development leaders provide lectures and talks on all areas of the business. Microsoft Games Studios' Phil Spencer, Ubisoft's IP director Tommy Francois, and Bungie lead programmer Damian Isla are already confirmed as speakers. So too are Relentless' development director Andrew Eades, Frontier's David Braben, Naughty Dog lead designer RIchard Lemarchand and Traveller's Tales' development director Jonathan Smith.

The event runs from July 29th to 31st at the Hilton Metropole hotel in Brighton. Develop Mobile and education event Games:Edu take place on the first day, with the full conference and expo taking place on July 30th and 31st. The Develop Industry Excellence Awards take place on July 30th also.

"Last year, more than 1,200 delegates from 29 territories attended Develop – an increase of 12 per cent on 2006," said Andy Lane, managing director of organiser Tandem Events. "To become established so rapidly as the destination for the development community in Europe is indicative that Develop is providing the industry with the content, networking opportunities and location the industry wants from its annual gathering."

For 2008, the Develop conference has been programmed around new themes reflecting the current state of the games industry: capitalise (asking how studios can take advantage of market trends); specialise (examining how developers can stay at the cutting edge); inspire (covering how the industry can motivate and retain staff); and enjoy (with the event providing thought-provoking features and social events reaffirming the joy of games development).

"This is the most exciting yet least appreciated point in the development cycle – game projects started now will be the ones to truly exploit Microsoft, Sony and Nintendo's current hardware, and so define this generation. We're therefore going back-to-basics for 2008, with a packed programme focused on perfecting the state-of-the-art," added Owain Bennallack, Develop conference advisory board chairman.

A variety of different pass types are available for this year's event: Super, Standard, Mobile, Audio and Expo. Discounts are available on all passes purchased before July 1st, and the expo pass is free of charge. More details can be found at the official site.
www.developconference.com

DEVELOP DIARY

YOUR COMPLETE GAMES DEVELOPMENT EVENT CALENDAR FOR THE MONTHS AHEAD…

GAMEHORIZON CONFERENCE 08

GAMEHORIZON CONFERENCE
June 18th and 19th
Newcastle, UK
www.gamehorizonconference.com

GameHorizon returns with its conference aimed at 'CEOs, studio heads, managing directors and senior and acquisition executives from games companies'.

The event is aimed to be as much about networking opportunities as it is speakers, but hat doesn't mean that the sessions take second fiddle, though – the organisers promise that attendees will 'be energised and inspired by the industry's most influential figures and greatest visionaries'.

MAY 2008

NORDIC GAME CONFERENCE
May 14th and 15th
Malmo, Sweden
www.nordicgame.com

JUNE 2008

GAMEHORIZON CONFERENCE
June 18th and 19th
Newcastle, UK
www.gamehorizon.net

PARIS GDC
June 23rd to 24th
Paris, France
www.parisgdc.com

JULY 2008

E3 SUMMIT 2008
July 15th to 17th
Los Angeles, USA
www.e3expo.com

DEVELOP CONFERENCE
July 29th to 31st
Brighton, UK
www.developconference.com

DEVELOP INDUSTRY EXCELLENCE AWARDS
July 30th
Brighton, UK
www.developmag.com/develop-awards

XNA GAMEFEST
July 22nd and 23rd
Seattle, USA
www.xnagamefest.com

CASUAL CONNECT AMERICA
July 23rd to 25th
Seattle, USA
seattle.casualconnect.org

AUGUST 2008

SIGGRAPH 2008
August 11th to 15th
Los Angeles, USA
www.siggraph.org

GCDC 2008
August 18th to 20th
Leipzig, Germany
www.gcdc.eu

GAMES CONVENTION
August 20th to 24th
Leipzig, Germany
www.gc-germany.com

SEPTEMBER 2008

AUSTIN GDC
September 15th to 18th
Texas, USA
www.gdconf.com

CHINA GDC 08
September 24th to 26th
Beijing, China
www.gdcchina.cn

NOVEMBER 2008

MONTREAL GAMES SUMMIT
November 6th and 7th
Montreal, Canada
www.sijm.ca/2008/

GAME CONNECTION
November 5th to 7th
Lyon, France
www.game-connection.com

FEBRUARY 2009

GDC 09
March 23rd to 27th, 2009
San Francisco, USA
www.gdconf.com

VARIABLE DECLARATIONS

by Owain Bennallack

Squeezing the middle-classes

Writing studio profiles for the *Develop 100* always turns up surprises. Who knew quirky *Cooking Mama* had sold enough to propel Office Create into our top 50? And do we really need so many award-winning Canadian studios who've never made a game you've played?

Reviewing a year can reveal big trends, too, but here 2007 was messy. In a period dominated by the push-me-pull-you between independent developers, publishers and console manufacturers, seemingly anything went.

We had mega-mergers, such as Activision Blizzard. And yet we also saw Microsoft slim down by returning Bungie to independence. So perhaps format holders don't need to own studios? Except that Sony bought Evolution in September, after the huge success of *MotorStorm*.

Traveller's Tales went to Warner, Bizarre Creations to Activision, Climax Racing to Disney - an old story reasserting itself anew. In recent years, Elevation Partners constructed a super-developer and indicated new money from outside of games might reshape things, but by October it was flogging BioWare and Pandemic to… Electronic Arts.

But it doesn't even boil down to EA buying whoever it wants – not until it secures Take Two, not to mention Ubisoft.

The dominance of big companies and publisher-owned studios on our Develop 100 proves that little has changed in games development in recent years

SAME OLD DIFFERENCE

As empire building execs reshape the industry like Greek gods playing dice over chessboards and canapés, excited talk on the ground in 2007 as ever concerned new distribution channels and even – contrary to all visible evidence – the resurgence of independent development.

In reality, 2007 supplied more prosaic truths: Making blockbuster games is ever more entrenched with the biggest players, and voluble people with opinions don't like working for publishers. Bungie is perhaps the exception that proves the rule, making headlines precisely because going it alone as a big independent is these days newsworthy.

Die-hard romantics will lament this state of affairs, but a cadre of senior management now exists who've never known independence nor aspire to it. Typical is a jewel Microsoft has kept hold of – *Forza* developer Turn 10 – whose head says he'd prefer to make games snug in Redmond's cocoon than worry about balancing the books.

> **"Die-hard romantics will lament this state of affairs, but a cadre of senior management now exists who've never known independence nor aspire to it…"**

PlayStation Home and Xbox Live Arcade, casual games, mobile distribution, advertising, micro-transactions – these might eventually change up the playing field, but for now it's business as usual. I'm no longer even convinced the death of boxed retail product will truly open things up. Some newcomers will emerge, but access to well-managed talent, deep pockets and marketing blowouts are the constituents of a nearly all modern game hits, and digital distribution won't change that.

For all the hand waving over Wii or XBLA, what's really changed recently in mainstream gaming? Most of the business model innovation that's latterly come to consoles has been on PCs for over a decade. New ideas are being explored – particularly cross-media projects like *Guitar Hero Aerosmith* and EA's game-into-movie *Dead Space* – but again, it's money, scale and corporate credibility that enables them.

OWNERSHIP NOT FOR SALE

In 2008, just like 1998, it still boils down to intellectual property. Whoever owns the content has the most power. Thus merging to own as much as you can makes sense.

In some businesses, such as music, IP ownership is in play. Stars like Radiohead sense an opportunity to regain control, and the unsigned artist who's a legend on his own MySpace page is now routine. Accordingly, private equity boss Guy Hands, who bought struggling EMI, is able to slash back the company's 'waste', from mews houses to £20,000 budgets for candles. i.e. the sort of fluff that *was* the music industry until recently.

With free music everywhere, do you want to own the songs, the talent, iTunes or the T-shirt stall? As the question is answered, the power will shift.

In games, nothing has changed regarding IP ownership. For every Introversion or Telltale Games there are hundreds of developers who want to make the next huge *Halo* or *Zelda* and accept the ownership compromises required.

It's hard then to see 2008 or even 2009 playing out differently to 2007. The big will get bigger, the small smaller.

On that last point, I mean nimble start-ups being formed to exploit those new niche channels, as opposed to established, high-quality outfits shrinking. For the few sizeable indie Euro studios left – Realtime Worlds, Rebellion, Blitz, Eurocom, Kuju, and a handful of others – life looks grand, unfavourable exchange rates or grant gripes aside.

Fewer big indies means more work for those who remain. The problem is that remaining independent seems perversely risky, compared to the instant reward some would get for kissing a bloated suitor's hand. Not a bad problem to have.

Owain Bennallack is executive editor of *Develop*. He edited the magazine from its launch until its February 2006 issue. He has also worked at *MCV* and *Edge*, and has provided consultancy and evaluation services to several leading developers and publishers. He is also chairman of the *Develop* conference advisory board.

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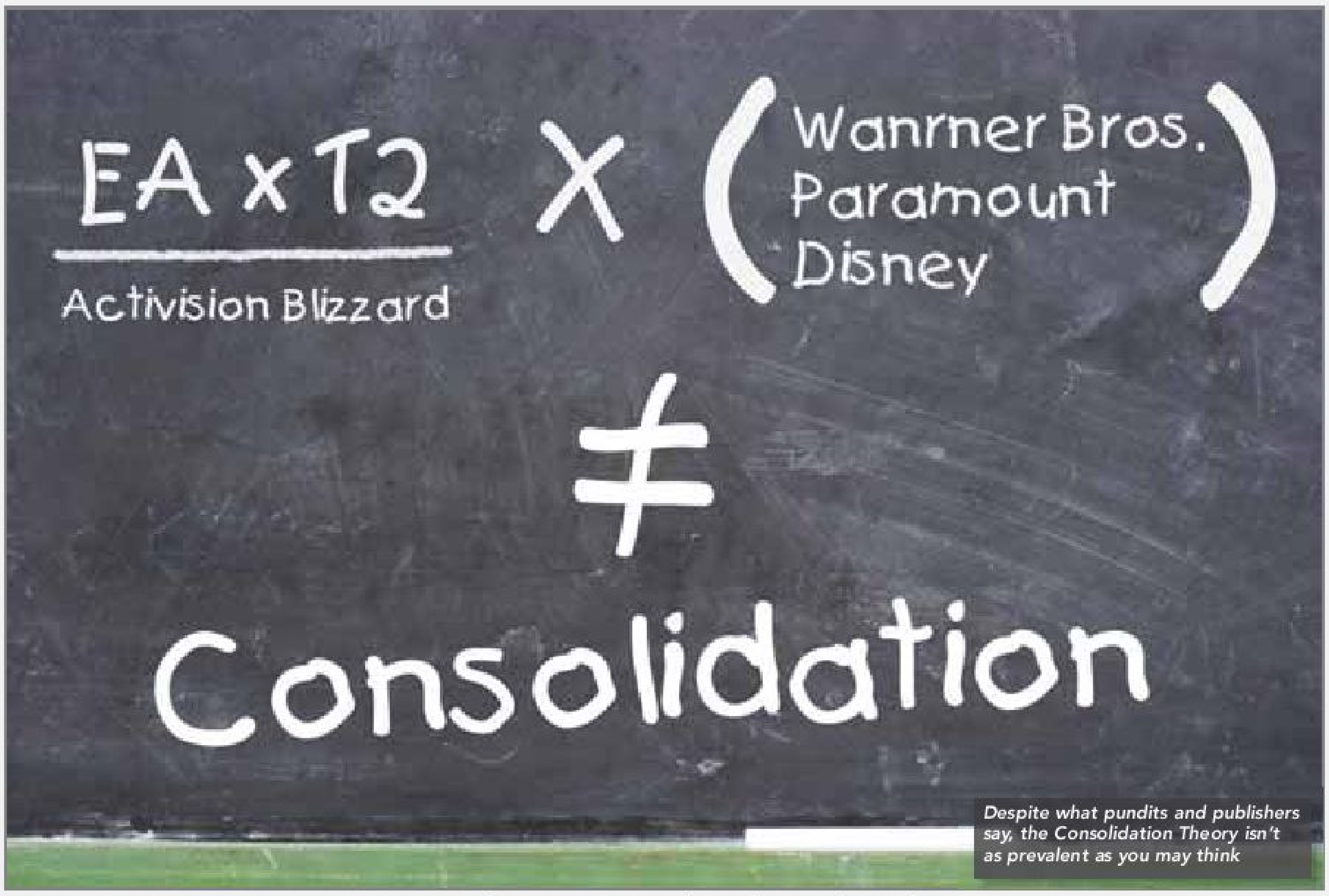
MIND YOUR OWN BUSINESS

by Nick Gibson

Debunking the Consolidation Theory



Despite what pundits and publishers say, the Consolidation Theory isn't as prevalent as you may think

Within five years the global games market will comprise just four or five major publishers and a handful of struggling independents.

I remember this gloomy prognosis, let's call it the 'Consolidation Theory', first being sold to me during the first few months of my career as a games analyst in early 1996. Since then I've heard it repackaged and resold on a regular, almost monotonous, basis, whatever the market conditions. The dotcom boom years saw over $3bn of new capital raised for games, most of it by a tiny number of companies; the dotcom collapse saw widespread belt tightening and the scramble away from strategic investment and towards value; successive console generations have precipitated growing business model challenges. Over the last decade, each of these phases of the industry's evolution have been used to support the reiteration of the Consolidation Theory. And yet it has never actually materialised. In fact the opposite appears true.

A quick peek at retail software sales, still the vast majority of the games market by value, reveals little evidence for Consolidation Theory. Using the US video games market as a barometer, there is not a single publisher that has consistently grown its market share during the last decade: all of the top 20 have continually swapped positions as well as lost market share during at least one year. However, most tellingly, the top five publishers' aggregate market share has actually shrunk from around 68 per cent of the market in 1997 to 50 to 55 per cent for most of the last six years with an Activision-driven leap to 62 per cent last year.

Far from being dominated by a handful of major publishers, the games market over the last decade has seen a gargantuan proliferation of new games businesses fuelled by increasing geographic, demographic and business model diversification.

Taking a holistic view, the global games pie, in particular with its network and Asian gaming ingredients, is being shared far more broadly than ever before. I believe that the top five global games publishers have actually lost even greater collective market share than the US data suggests. This is thanks largely to the emergence of scores of new mobile and online games businesses in the $50m+ revenue bracket that did not exist a decade ago, which has resulted in a significant swelling of the lower and mid-tier publisher ranks that amass below the top five.

> ***"Far from concentrating power, the industry is diffusing to allow room for many more companies…"***

With the merger of Vivendi Games with Activision and EA's proposed acquisition of Take Two, clearly the publishing landscape is changing and once again the Consolidation Theory is being widely discussed. Will it actually happen this time? I have my doubts. Aside from history's propensity to repeat itself, there are a number of arguments against it.

The 'emerging market' of network gaming continues to attract considerable venture capital. It's the fastest growing market segment and one where independents continue to thrive. Network gaming is undoubtedly more meritocratic than the retail market; success is more likely to be determined by product quality than by brand licence or marketing spend and, as such, it does not reward scale as the retail games market does. Network gaming can have lower barriers to entry and often employs creative and more efficient economic models which have allowed independents to identify and exploit niche or novel areas that the major players would never consider investing in.

Even within the retail games market, one can point to additional market share growth by mid-tier publishers like Ubisoft and Microsoft as well as the advent of asset-rich new market entrants such as Disney, Time Warner and Viacom as evidence of the growing rather than lessening level of competition for the retail dollar. Of course, the market could witness new top and mid-tier acquisitions but such transactions, if they take place, are arguably just as (if not more) likely to be instigated by non-games companies with a hungry eye on the games sector such as News Corp, GE and Bertelsmann (as well as Disney, Viacom and TW). Although a string of acquisitions by a single ambitious entity, although somewhat unlikely, could feasibly fashion a new top five powerhouse, such moves are more likely to bolster the mid-tier of the market rather than consolidate the top tier.

Far from concentrating power in ever fewer companies, I would argue that the games industry is currently diffusing to allow room for many more companies, many specialising in an ever-broadening array of market sub-categories, with market share being distributed more evenly amongst lower and mid-tier companies, who are both expanding and taking an increasing proportion of the overall market.

As barriers to entry for publishing diminish, over time this effect will be exacerbated by the increasing ease of home-brew development and self-publishing as well as the potentially significant impact of user-generated content. The result is further shrinkage in the top tier.

Nick Gibson is a director at Games Investor Consulting, providing research, strategy consulting and corporate finance services to the to the games, media and finance industries
www.gamesinvestor.com

DESIGN DOC

by The Alpenwolf

Don’t worry, just play

Open-ended games like *Madden* and *Tabula Rasa* provide value that no recession can dampen

Banks are in trouble everywhere from London to Zurich and New York. The pound is soaring against the American dollar. The global economy is either in a recession or fast approaching one and consumers are being squeezed by the mystifying combination of higher gas prices and taxes while the official inflation measures and salary increases remain low.

Does this mean that the game development industry is in for some difficult times like so many other industries appear to be? Not necessarily.

As one can see from comparing the economic history of the last 25 years with the game development industry, there is far from a perfect correlation between boom times in the games business and general economic good times. The recession of 1980 to 1982 coincided with the great classic videogame era of the Atari 2600, the Mattel Intellivision and the Coleco Colecovision. This golden age was followed by the videogame crash of 1983 that took place when the rest of the economy was well into its recovery.

The 1987 Black Monday crash that nearly leveled the City and Wall Street took place just eleven days before NEC kicked off the glorious 16-bit era that brought us everything from *Sonic the Hedgehog* to *Star Fox*. And the dotcom collapse coincided closely with the smashing twin successes of the PS2 and Xbox.

There are two reasons for this lack of correlation between the health of the games industry and the greater economy. The first is that games are one of the cheapest forms of entertainment around. If measured in pounds per hour, playing *Tabula Rasa* or *FIFA* is incredible value that simply can’t be beaten by anything except amateur pornography, free hotel Bibles, or kicking a football around with your mates.

Your individual mileage will vary, of course, depending upon your tastes, athletic abilities and moral standards, but the fact is that despite the relatively high cost of games, their extended playability renders their cost per hour extraordinarily low.

For example, I am a *Madden NFL* football junkie. Every year, I celebrate *Madden* Day with the latest edition in the series, which costs around £50 (I prefer the PS2 version for playability reasons, even though the graphics aren’t as flashy.) Since I have played it for at least 150 hours in the last year, my cost of *Madden*-playing is about 33 pence per hour.

> **“FIFA is incredible value that can’t be beaten by anything except amateur pornography…”**

Compared with nearly any activity in which one can engage these days, that’s an amazing value, and since I’ll probably play another 150 hours before the 2009 edition comes out, my real hourly cost of gaming is probably around 16 pence.

And while it’s obvious that not all games are capable of providing this level of extended entertainment, MMOs such as the *World of Warcraft* offer even better play-value than the best console games. I don’t know how many hours I’ve put into *WoW* – I really don’t want to know, to be honest – but I’m confident that in light of the 12,000-plus battleground kills by my character, the hourly cost of *WoW* is even lower.

So, no matter how bad the economy gets, most gamers will be able to afford to continue playing their favorite games. They may buy fewer games in an economic contraction, they may put off purchasing a new console or adding a peripheral to their system, but they simply will not stop gaming.

The second reason is that unlike food, fuel and shelter, games are an optional purchase. This means that game sales are primarily driven by the desire of gamers to play particular games. Despite the large numbers of games being produced, the usual 80/20 rule applies in which 20 per cent of the games draw 80 per cent of the revenues.

The great crash of 1983 was primarily due to the fact that the games being produced at that time simply weren’t very good compared to the games that preceded them; the industry tends to slump when publishers get too caught up in either chasing each others’ tails or relying on marketing instead of focusing on developing genuinely new game ideas while continuing to refine the series-oriented cash cows. When we’re smart and innovative, we do well. When we’re lazy and derivative, we don’t.

This means that the health of the industry is in our collective hands. We control our own destinies. That’s a very good thing, because otherwise it would be in the hands of a bunch of clueless bankers who think it’s safe to bet trillions on the idea that American housing prices can escalate forever. And that’s just not very good design.

The Alpenwolf is a professional game designer who has been active in the industry for 17 years and designed games for some of the largest American and Japanese publishers. He has been known to visit Ironforge in the company of a large white wolf. design@alpenwolf.com

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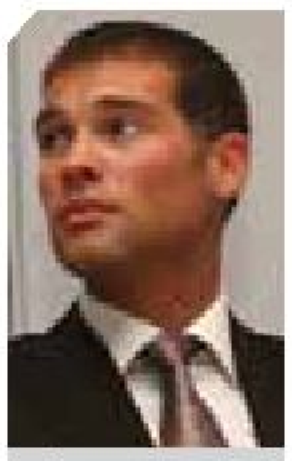
SHERIDANS

Legal Q&A: Piracy of Content

Starting a new series of articles, **Jeremy Roberts** of law firm Sheridans will examine legal issues faced by games developers…



***Jeremy Roberts** is a partner at the leading entertainment law firm, Sheridans.*

Is infringement of intellectual property (IP) a serious issue for developers and publishers?
It's a very serious issue for creators and owners of all digital content. The internet and mobile communications allow access to information at the touch of a button. Whilst that offers fantastic opportunities for downloading music, films or games, it's also made file sharing and piracy that much easier.

What form does the piracy usually take?
By far the most common form is people swapping files, mostly music or games, for personal use. Studies have shown that a lot of people don't even realise that they're committing theft. Much of the battle ahead is about raising awareness.

Is DRM the right solution to consumer piracy?
People tend to split into two camps on this one. Some say it's ineffective and it unfairly restricts usage. Others argue that it's a necessary tool to protect and sell digital content. Either way, for now it is undoubtedly one of the main weapons against consumer piracy. But unfortunately it's also expensive and can be easy to crack, so it's not the perfect solution.

> ***"Piracy is a serious issue for all creators of digital content…"***

What else can be done?
Consumers' awareness and expectations need to be changed, and the best way to achieve that is by using both the carrot and the stick. Prices for music, games or software should be set at a reasonable level to encourage consumers to pay for and acquire content legally. At the same time users must be made aware that unauthorised file sharing is theft and the penalties can mean a fine or even prison. And, finally, there needs to be a serious and real threat of legal action against those who continue to steal unlicensed content.

What can I do if I discover that my content is being ripped off?
If it's a case of an individual sharing a file for personal use then a strongly worded letter may suffice. If it's more systematic or on a larger scale then you should get legal advice. Don't be put off by cost. A good lawyer should be able to tailor their approach to both the problem at hand and your budget. Piracy can cost owners of audio content thousands of pounds. Spending some money to protect your intellectual property may well be the best investment you make.
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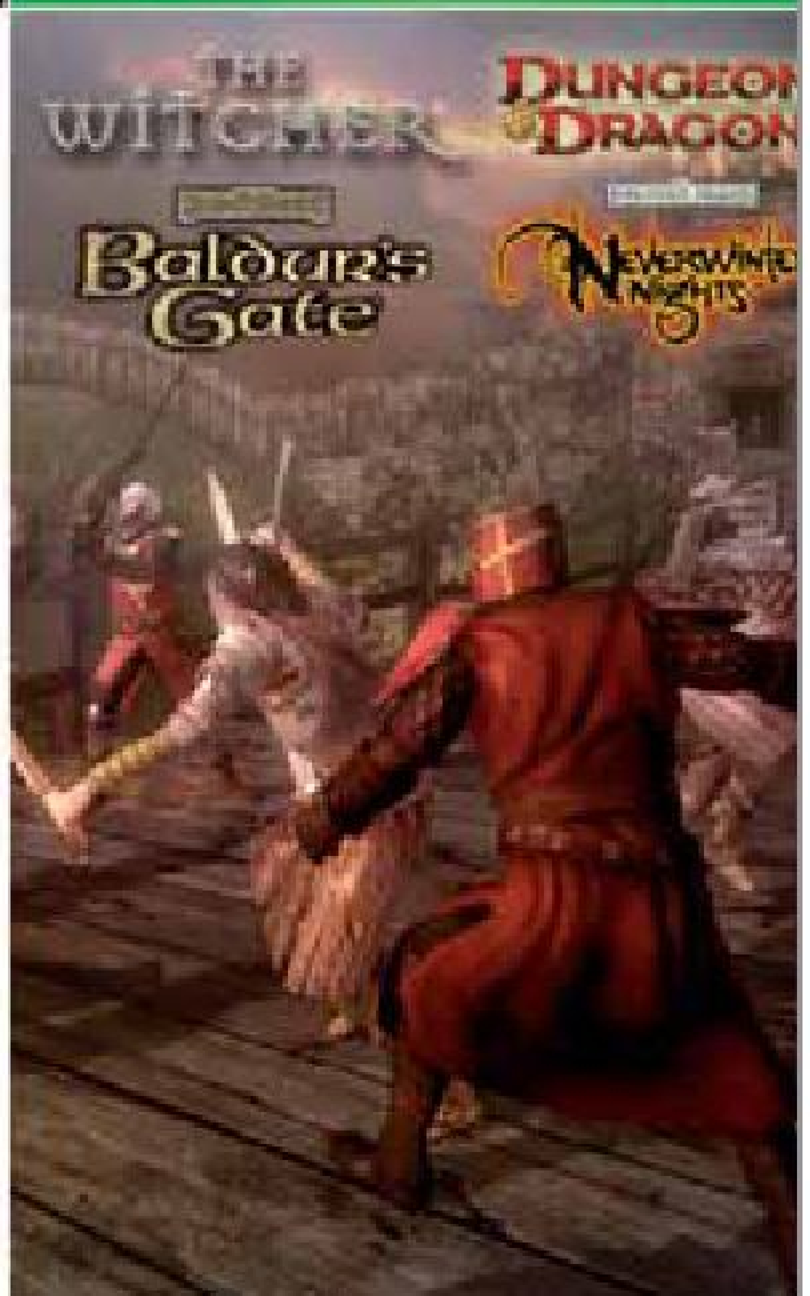

ATARI

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The RPG Product Manager will be responsible for marketing Atari's cross-platform next gen games based on well established RPG brands, including Neverwinter Nights™, Baldur's Gate™, Dungeon & Dragons®, and The Witcher®. The position is based within the Brand Management Worldwide Publishing team and reports to a Senior Group Product Manager. The Product Manager will liaise with major licensor contacts such as Wizard of the Coast and Hasbro.

The product manager will define and implement the worldwide marketing strategy for all of Atari's future RPG titles. He will also make recommendations and provide the tools needed to sustain the product in the market and extend the product's life cycle in all distribution territories.

Ideal candidates must have several years experience as a Product Manager within the Games or Entertainment Industry and must have a strong background in the RPG genre. The candidate has shipped at least one successful cross-platform AAA quality title. The candidate is a strategic thinker and has experience creating and managing P&Ls. English fluency is required.

With a new appointed CEO, Atari are aiming to take the games industry by storm this year with plans to push the Atari brand online. This is a totally fantastic time to get on board, if you are up to the challenge, then please contact our exclusive recruiter **Sharon Hibble on +44(0)1206 544044** or email **atari@opmjobs.com**

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GREATBRITISHGAMES

Black & White

Playing God is fun, says **Rick Gibson**, but reigning ambition is the real divine characteristic…

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EA

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ESTIMATED TOTAL UNIT SALES: 2.5 – 3 million (PC)

TIMELINE:

1989: *Populous*
2001: *Black & White*
2002: *Black & White Creature Isle (expansion disk)*
2005: *Black & White 2*

OWNERSHIP HISTORY

1987: Bullfrog founded by Les Edgar and Peter Molyneux.
1989: *Populous*, the first 'God-sim" game released on PC.
1995: Bullfrog acquired by EA for an estimated $25m-$30m.
1997: Peter Molyneux leaves EA to form Lionhead studios with Richard Evans, Mark Hedley, Steve Jackson and Tim Rance.
1998: EA Distribution secured as publisher for *Black & White.*
2000: Lionhead initiates satellite development studio structure.
2002: Lionhead investigates flotation on London Stock Exchange.
2004: Lionhead takes on investment of an estimated £7m from a consortium of investors (IDG Ventures Europe, Ingenious Ventures and Add Partners), *Fable* released, reaching over 2m unit sales.
2005: *Black & White 2, Fable: The Lost Chapters* and *The Movies* released.
2006: Lionhead initiates major restructuring, making 50 development staff redundant.
2006: Lionhead is acquired by Microsoft one month later for an undisclosed sum.

Creator: Peter Molyneux, Richard Evans

GAME INCEPTION AND GROWTH

The concept of the god simulation strategy games, which place the player in the role of god-like entities, can be traced back to 1989 and the release of *Populous* by Peter Molyneux's first Guildford-based development studio, Bullfrog Productions. *Populous* proved to be Molyneux's most successful game series, going on to achieve an estimated 4m unit sales across multiple SKUs and driving the acquisition of Bullfrog by EA in 1995.

Black & White came to life when Peter Molyneux and Richard Evans left Electronic Arts to form a new company, with the aim of creating quality games using small teams. They quickly secured a publishing agreement with EA and began development in earnest with a new team largely staffed by ex-Bullfrog staff and Cambridge graduates.

The game took some of the core gameplay concepts of *Populous* and expanded upon them, adding a more open-ended game structure, artificial life simulation (developed by Richard Evans) and expanding the strategy components. Players use their divine powers to cajole and persuade villagers on an island to worship them, and also make use of an AI-powered mythical creature which inhabits the island and performs acts of violence, benevolence or even assistance for the player. The game's name refers to the moral dilemmas resulting from this gameplay.

The game's release was delayed several times as tweaks and improvements were added. However, when it was finally released, *Black &*

White was very well received by the critical press, and was acclaimed for its novel features and gameplay. Its success spawned an expansion pack (*Black & White Creature Isle*). Together they achieved some 2m unit sales. The game was only ever released on PC; development of PlayStation and Dreamcast versions of the game were started but never released.

By the time work began on *Black & White 2*, Lionhead was working on a number of titles (*Fable* and *The Movies*) as well as developing new game concepts. The size of the development team had grown dramatically from 25 on the first game to over 70 on the second, and an overall company headcount of over 220. The efficiency of the enlarged studio was low, its senior production managers were overloaded and the company's senior management were being distracted by protracted attempts to raise finance whilst still trying to manage three large teams.

The game's sequel was based on a moderately improved version of the original game engine and featured a more structured form of gameplay. It was reasonably well received by the critical press but not as well received by consumers as the original (later attributed by Molyneux to failing quality levels after a rushed release). As a result, the game underperformed commercially, achieving only a fraction of the unit sales of the original.

COMPANY INCEPTION AND GROWTH

Lionhead Studios was set up by Peter Molyneux, Steve Jackson (co-founder of Games Workshop with Eidos' Ian Livingstone), Mark Webley and Tim Rance in 1997. The original aim was to create and maintain only a small development team working on a single title. *Black & White* was their first title and, with the company financially underpinned by Peter Molyneux, the company was able to secure an advantageous publishing deal with Electronic Arts' Distribution business (a business that focuses on publishing games IP developed/owned by third parties and one that is separate to the main, higher margin EA publishing business) well before major development milestones were reached.

However, Lionhead found itself being approached by several other development teams, and it saw an opportunity to nurture them by setting up a 'satellite development' business where Lionhead would help secure publishing deals and provide admin support in return for equity and royalty participation.

Under this system, Lionhead quickly took on two new teams, Intrepid and Big Blue Box, and even separated out the *Black & White* development team in 2000 to form Black & White Studios. The satellite structure, however, failed to remain intact. Intrepid had its project cancelled and the studio was subsequently closed. Big Blue Box, which developed *Fable* for Microsoft, was eventually brought in-house after selling over 3m copies. Black & White Studios was in effect only an internal division formed to allow a degree of development management autonomy and never actually acted as a true satellite.

Partly driven by the satellite system, but also by the cash flow from the original *Black & White* sales, Lionhead expanded rapidly – at its peak hiring two to three new staff each week. By early 2006, despite being founded on the principal of keeping development teams small, it numbered 220 staff, and was burning over £1m per month. The management decided it needed more infrastructure to handle its teams, and in 2001 began to investigate a flotation on the London Stock Exchange (at the time approaching the apex of its dotcom-inspired ascent).

However, the company's management found itself stretched between meeting potential investors, re-structuring the company to prepare it for a public listing and managing the company's continued growth. The collapse of the dotcom bubble brought the flotation process to a halt and the company had to once again re-organise itself for its continued unlisted (and, at that stage, under-funded) existence. Needing a greater cash inflow than publisher funding was providing, Lionhead next sought venture capital and secured an estimated £7m investment from a consortium of UK-based investors (IDG Ventures Europe, Ingenious Ventures and Add Partners).

Unfortunately for the investors, two out of three of Lionhead's major titles in development, *Black & White 2* and *The Movies*, failed to live up to their promise – although the third, *Fable*, was a success, achieving around 1.5 million unit sales in its first month and over 3m to date. Like many of Lionhead's products, *Fable* had experienced a difficult development process, suffering several release date postponements. The company had begun to get less stable financially, with one project bootstrapping another late game.

The elevated cost that this represented, combined with the commercial inertia of *Black & White 2* and *The Movies*' poor sales, forced Lionhead to undergo yet another restructuring whilst starting the search for a potential acquirer. Lionhead reduced its headcount to around 135, even letting 85 staff go just a month before its acquisition in 2006. A number of publishers were courted but, of the final three, it was eventually Microsoft that acquired Lionhead for a sum believed to be around $40m (of which half is believed to have been debt repayment).

> ***"Lionhead committed the cardinal sin of games development: expanding too rapidly…"***

Although Lionhead's sale appears to have been made under a degree of duress from investors ready for an exit and from disappointing sales of two out of three of its major titles, its management were greatly relieved to find financial stability within a major publisher and go back to creating innovative games. Its sale value reflected both the IP rights and the creative force at the company's centre.

ANALYSIS

The original *Black & White*'s commercial and critical success suggested an extremely bright future for Lionhead. However, instead of adhering to its original ambition of remaining a small, focused single-team developer, Lionhead committed the cardinal sin of games development: expanding too rapidly on the assumption that all games would match the quality of the first. Whilst *Black & White 2* was being developed, Lionhead's focus began to be spread amongst numerous other projects. Instead of focusing on execution, its management team became distracted and tied down with flotation and then venture capital investment. The additional investment secured in the middle of the company's lifecycle helped its survival and expansion but undoubtedly hastened its premature sale.

The expansion of concurrent development teams has often historically proven challenging if not fatal for some games developers, and Lionhead's expansion and then sudden contraction after a successful first game is mirrored in the demise of many a UK studio. To attempt such an expansion whilst the senior management were heavily distracted with non-games issues only compounded the potential for disaster. The cancellation of a number of Lionhead projects and the commercial failure of key releases *Black & White 2* and *The Movies* were undoubtedly attributable in part to Lionhead's failure to grow in a controlled way, although schedule pressure from publishers also played its part.

Ultimately, *Black & White*'s potential as a major games franchise was damaged – possibly irredeemably – by its flawed sequel, and it's likely that most of Microsoft's estimated $40m valuation of Lionhead Studios was based on bringing the *Fable* IP (and also Peter Molyneux himself) in-house. It's unlikely that the *Black & White* intellectual property rights featured prominently in the valuation, and it is still unknown whether any further *Black & White* games will be produced.

CONCLUSIONS

- The game received a strong critical reception with very high average review scores.
- Novel gameplay combined god-sim, artificial life and strategy genres to make a very compelling game.
- The original title had a highly open-ended game design.
- *Black & White* benefited from being published by Electronic Arts, then the largest games publisher in the world, and a massive PR campaign headed by Peter Molyneux, one of the best-known games developers.
- The development team, many of whom had worked at Bullfrog, had a strong pedigree.

Games Investor Consulting is a specialist games industry consultancy founded in 2003 to provide independent games research and corporate finance consulting to the games industry and financial community. Headed by Rick Gibson and Nick Gibson, GIC is one of the industry's most trusted sources for market intelligence, has generated a number of industry-standard reports, and has consulted on games strategy and research for numerous games and media companies as well as trade and governmental bodies.

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INDUSTRY EXCEL

Categories

CREATIVITY
- Best New IP
- Best Use of a Licence
- Visual Arts
- Audio Accomplishment
- Publishing Hero

TECHNOLOGY & SERVICES
- Tools Provider
- Technical Innovation
- Services and Outsourcing
- Recruitment Company
- Games:Edu New Talent Award

STUDIOS
- Best New UK/European Studio
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- Best Independent Developer
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INDUSTRY
- Development Legend
- Grand Prix

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THE DEALS

FONIX ENDS WAR
Ubisoft has chosen to licence Fonix' VoiceIn speech-recognition technology for its forthcoming voice-driven Tom Clancy title *EndWars*, pointing to its multi-platform availability as a key factor in the decision. "The results thus far have been tremendous," said Ubisoft's Vincent Greco.
www.ubisoft.com

FUTUREMARK FX
Futuremark Games Studio, the game spin-off studio of *3DMark* benchmark developers Futuremark, has picked Allegorithmic's ProFX procedural texture technology. It'll use the middleware on its first title, which is said to be based on original IP.
www.futuremark.com/games

UNREAL AUDITION
Korean studio Yedang Online, developers of the 100 million user-strong online dancing game Audition, has licenced Epic's Unreal Engine 2.5 for its new title, which is currently in open beta. *Prisontale 2: The Second Enigma* has been in development for four years.
www.yedangonline.com

DEXTER'S MARK
Mark Ecko Entertainment has signed a deal with US network Showtime for a game based on the *Dexter* TV series. The company outsources development to other studios: currently it's working with Human Head on an secret title and is in discussions with several studios about the *Dexter* project.
www.sho.com

NCSOFT'S ENGINE BINGE
Not content with licensing just one engine in a month, NCSoft has picked two – Emergent's Gamebryo and Epic's Unreal Engine 3. Gamebryo is being used by the North American team to help speed up the prototype process, while Unreal Engine 3 is being used on two forthcoming games, the development locations of which are currently unknown.
www.ncsoft.com

MONUMENTAL PAYMENTS
MMO technology suite developers Monumental have partnered with payment company PayByCash to offer non-cash payments for games developed with the system. Over 60 payment methods will be added in the deal.
www.monumentalgames.com

DEVELOPER CHART

APRIL 2008

1

→←

LAST MONTH **1**

NINTENDO

BEST SELLING GAME:
Wii Play

No surprise to see Nintendo here in the number one position yet again, although this month's top seller for the company isn't the venerable Dr. Kawashima for once. Some may have questioned whether a simple mini-game collection could have sold this well, but don't forget that bundled remote.

Wii

2

↑

LAST MONTH **5**

SEGA

BEST SELLING GAME:
Mario & Sonic At The Olympic Games

Seperately the character rosters of the *Mario* and *Sonic* games have their fans, so it shouldn't be much of a surprise that putting the two 'enemies' in an actual competitive arena would be popular – but is that behind the game's continued success? We'll see if Sega's 'serious' Olympics game fares as well.

Wii, DS

3

↑

LAST MONTH **15**

CAPCOM

BEST SELLING GAME:
Devil May Cry 4

Riding on Dante and Nero's stylish, pirouetting coat-tails up 12 places, Capcom's more accessible stab at the *Devil May Cry* series is proving more popular than some might have anticipated. Well, the cast must have been worried – they've all seemingly gone grey.

XB360, PS3

4

↑

LAST MONTH **8**

CRITERION

BEST SELLING GAME:
Burnout Paradise

The high-octane racer's return, while slighly tardy, has gone to prove that for all your *Forzas* and *Gran Turismos*, there's a sizable amount of people that just want to smash the hell out of all and sundry. Some of them even want to do it in cars, too.

PS3, XB360

5

↓

LAST MONTH **2**

INFINITY WARD

infinityward.com

BEST SELLING GAME:
Call Of Duty 4: Modern Warfare

Infinity Ward's modern take on the *Call of Duty* series continues to mercilessly storm the charts, its cross-platform chops no doubt helping it bob above Bungie's massively popular *Halo 3*. And with a reported million people playing *Call of Duty 4* online every day, expect *CoD 5* to do just as well.

XB360, PS3, PC

OUR MONTHLY RANKING OF THE WORLD'S STUDIOS BASED ON UK GAMES SALES

CHART KEY	
⬆	UP
NEW NEW ENTRY	⬇ DOWN
▨ INDEPENDENT	⇄ NO MOVE

Rank		Last month	Studio	Game	Formats		
6	⬇	4	**EA CANADA**	FIFA 08	PS2, PS3, PSP, XB360, Wii, PC	🇨🇦	
7	NEW	-	**PROPAGANDA GAMES**	Turok	XB360, PS3	🇨🇦	
8	⬇	3	**UBISOFT (MONTREAL)**	Assassin's Creed	XB360, PS3	🇨🇦	
9	⬇	7	**MAXIS**	The Sims 2: Castaway	DS, PS2, PSP, Wii	🇺🇸	
10	⇄	10	**TRAVELLER'S TALES**	Lego Star Wars: The Complete Saga	Wii, DS, XB360, PS3	🇬🇧	▨
11	⬇	6	**EA BLACK BOX**	Need For Speed: Pro Street	PS2, PS3, Wii, XB360, PSP, PC	🇨🇦	
12	NEW	-	**PIVOTAL GAMES**	Conflict: Denied Ops	XB360, PS3, PC	🇬🇧	
13	⬇	9	**KONAMI DIGITAL ENT.**	Pro Evolution Soccer 2008	PS2, PS3, XB360, DS, PC	🇯🇵	
14	⬆	64	**BIZARRE CREATIONS**	The Club	XB360, PS3, PC	🇬🇧	
15	NEW	-	**MERE MORTALS**	PDC World Champ. Darts 08	Wii, PS2, PC	🇬🇧	▨
16	⬆	37	**SONIC TEAM**	Sonic and the Secret Rings	Wii	🇯🇵	
17	⬇	11	**YUKE'S**	WWE Smackdown Vs Raw 2008	PS2, PS3, XB360, Wii, PSP, DS	🇯🇵	▨
18	⇄	18	**UBISOFT (FRANCE)**	Rayman Raving Rabbids 2	Wii, DS	🇫🇷	
19	⬇	13	**AMAZE ENTERTAINMENT**	The Simpsons Game	DS	🇺🇸	▨
20	⬇	19	**INTELLIGENT SYSTEMS**	Super Paper Mario	Wii	🇯🇵	

Chart Comment

They say that a change is as good as a rest, but given that we've still months to wait for our summer holidays and there's little change in our chart, it looks like we're not getting either for a while.

Actually, maybe the awful weather is just (quite literally) clouding our judgement – while three of the top five might be old favourites, there's two new entries for whom such a high place isn't a regular fixture.

Capcom's much hyped *Devil May Cry 4* has performed well at retail for what could be claimed as quite a 'hardcore' title – but we can point to both a deliberately more accessible difficulty level and, most crucially, an Xbox 360 release as two factors that have substantially affected the title's performance.

As mentioned elsewhere this issue in our *Develop 100* commentary, Capcom has truly learnt the lesson of appealing to both Eastern and Western audiences, and the effort it's put into developing its cross-platform MT Framework despite the Xbox 360's terrible Japanese performance is without a doubt paying off.

But let's not forget the other plucky top five entrant, the UK's very own Criterion. A late January release conspired to halt the studio's climb to the rafters, placing it in eighth position, but a longer stay in retail has seen the title perform as expected for such a big franchise. All that prime-time advertising can't have hurt, either.

> *"The effort Capcom has put into developing its cross-platform MT Framework is clearly paying off…"*

Also worthy of mention are the new entries this month, two of which – Pivotal and Mere Mortals – are UK-based (and the latter is even an independent). Highest new entry is Candian studio Propaganda Games, whose Disney-backed reboot of the *Turok* franchise has caused it to come in at number seven.

On second thoughts, that's quite a bit of change. Doesn't make the long wait 'til summer any more palatable, though.

Ed Fear
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Guildford PA1977F1

This is a unique opportunity to be a key member of an efficient team, where designing 'cutting-edge' solutions directly helps make their game fun. Whether you specialise in tool creation or audio programming. Must have 2+ years industry experience and shipped a console game with an online component.

Core Technology Programmer
£Excellent + Benefits

Midlands PA1362CTP

Our client is looking for an experienced core technology programmer who specialises in next generation graphics to further develop their propriety cross-platform technology. This is to work on a PS3/PC MMO title. You must have experience of designing and implementing new shaders and graphic techniques, strong software engineering and debugging skills. And a Minimum of at least two shipped games projects.

Graduate Programmers
£Excellent + Bonuses

Midlands LC342F1

This is a fantastic opportunity for talented graduates to join the development teams of our client who are working on AAA FPS titles. The ideal candidates must have a good degree (2:1 or above). Excellent 3d maths skills and who are fluent in C++ and assembler.

Junior/Graduate Programmers
£Excellent + Benefits

North West LC308F

The UK's leading development studio is seeking talented graduates to come and join them in their brand new purpose designed studio. Based in the North West they have a history of developing some of the best loved and biggest selling AAA titles of the last few years. They currently working on several AAA titles for next gen consoles and have various positions to fill.

Production Jobs

External producer
£DOE + Benefits

Berkshire CW003AP

The client is an international top-tier Publisher, with a string of chart-topping titles both to their credit and in development .They are looking to recruit a hard-working and ambitious External Associate Producer to work within a small but experienced team. The successful candidate will be responsible for managing projects from concept to release. The ideal candidate will have experience at producer level.

Senior Producer
£DOE + Benefits

Warwickshire CW014SP

The client is a top-tier developer and publisher of world-class video games, with a rich history within the games industry and over 60 chart-topping titles across all platforms to their credit.They are looking for an experienced game producer to ensure the on time and on budget creation of projects. The ideal candidate will have at least 5 years experience in a Producer role.

Localisation Testers (German & French)
€1930 p/m + overtime + bonuses

Netherlands DJ02329GF

My Client, currently based in Utrecht have delivered localisation and advertising services to the video games industry since 1997. They are currently looking for a German and French linguistic tester to join their rapidly growing Localisation department. You will be required to play through games, checking for grammar, spelling and contextual issues within the translated text.

Lead/Senior QA Technician
£Excellent + benefits

North West DJ245LSQA

Founded in 1998 by a group of industry veterans, Our client is one of Europe's most respected independent developers. They are currently looking for a Lead/Senior QA Technician to join their already established Quality assurance Team. The successful candidate must have lead at least two published games, and have aspirations to move into Production or Design.

Creative Jobs

Animator
£Neg DOE

North-West SH2382A

My client is currently looking to recruit a number of experienced Maya animators for their next round of big-license projects. The successful candidate will be able to portray convincing motion of a wide variety of subjects, as well as having the ability to rig and skin characters.

Experienced Designers
£Excellent + Benefits

Midlands SH014D

My client is looking to recruit a handful of industry experienced Game and Level Designers to join their team developing the latest edition of a worldwide 'AAA' franchise. Vacancies are across all levels, including Senior and Leads, so if you want to be part of a Triple A team, don't hesitate to apply!

Lead Artists
£Excellent + Bonuses

South-East/Midlands SH014LA

My client is currently looking to recruit two highly talented Lead Artists to work on their flag ship next-gen projects. The ideal candidates will have strong interpersonal skills and a proven management track record on at least one successful 'AAA' title.

Lead Designers
£40k - £60k DOE

South-East SH953LD

My client is a world renowned developer and has been responsible for some of the most ground breaking games ever. They current seek two Lead Designers with proven 'AAA' pedigree to head up the design of their latest next franchises. Excellent packages are on offer for successful candidates.

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BETA

DEVELOPMENT FEATURES, INTERVIEWS, ESSAYS & MORE

"The traditional earn out model doesn't work…"
Morgan O'Rahilly, CEO, Emote, p33

Emote's push into 'social gaming'
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How games compares to other sectors
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develop
INDUSTRY EXCELLENCE AWARDS

Want one?

Our guide to this year's Develop Awards tells you how to lobby, p41

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Emote CEO Morgan O'Rahilly (left) and COO David Rose (right)

A NEW DIRECTION FOR GAMES DEVELOPMENT?

Emote founders Morgan O'Rahilly and David Rose explain to **Michael French** why they think their new business could kick-start a new era of better business for games developers…

If you wanted, you could write a book about the current travails of games development, touching on a number of truisms which face the games development business: budgets are bigger because teams are bigger; timescales are longer because more content is needed making a modern game; risks are higher because your ROI arrives much slower.

Frankly, if it wasn't for the increasingly diverse nature of the games audience – which in just the space of a few years has widened to include casual, younger and older players while core gamers find new ways to play the games they always loved via online channels and at different session lengths – modern games development, and indeed much of the traditional games industry, would be in dire straits.

It's against this backdrop that relatively new company Emote has emerged. Formed by Morgan O'Rahilly and David Rose, the company – which calls itself a production company but is also a technology firm and games studio, with offices in London and Derby and a HQ in Liverpool – has a new approach to the way games are produced. But their philosophy doesn't just introduce a new way to produce a game; instead pretty much everything Emote is about attacks the norms of current development deals and seeks to solve the problems named above and unite the result with games that are driven by what they term social content.

THE NEW SOCIALISM

The 'social gaming' element is what the Emote team say is a key difference to the norms of the development sector. O'Rahilly and Rose's definition of social gaming is broad, mixing a variety of elements. It includes the firm's in-house technology, the Emote Platform, and concepts from the online games and social networking space – even a dash of alternate reality games (ARGs) – to create something which "takes a game beyond the game client itself" says Rose, and "makes an experience accessible via web, mobile or other interfaces which in turn could spawn new types of gameplay".

The Emote technology consists of a number of elements: the Emote Platform, which manages the connection to a 3D game client via a simple API; Emote Social, which monitors what players do in game and manages things like friend lists so all that data can be accessed outside of the game; Emote Char, a system which monitors and manages the player's in-game character, and can even be ported over to other games; plus EmoteCast, which adds further connectivity and asset management.

Essentially, what it allows is the creation of connected games (including both single and multiplayer titles), with a twist informed by Facebook and MMOs. Gameplay no longer exists in just the gameworld, which would run on a PC or console, but also the social network, which can be accessed by portable devices. To use one of Rose's examples as to how gameplay works across all of that: someone on a social network could own, for instance, a map for a game – and you might have to go through your friends list to find an NPC who can give you the details on how to get hold of it.

"In a 'normal' game, that would totally different – you'd be in the game world, there would be a button for 'Shop' and then all it relies on whether or not you have the 400 credits to buy the map," he says. "But in the context of a social network-based game it would be different – the other characters could be players, actors or NPCs, I'd have to find them, talk to them and buy the map off them. I might have to do something in the game world to earn their trust, or simply befriend them and get them on my friends list."

> ***"The traditional earn out model doesn't work. It's completely inequitable…"***

He adds: "For someone with an established IP that is valuable and rich, this is very unique in how it treats their property." He says that the concept could be as durable with a character-driven game as it would a sports game or Formula 1 racing game; it would work as well with *Worms* as it would *World of Warcraft*.

And there's a clear opportunity to start creating new IPs with that system explicitly in mind, Rose adds. He also says that the actual gameplay principles themselves are hugely scalable, saying there's a chance for someone to come up with a game that allows players to pick their level of participation – they might just want to engage in the social network side and never touch the 3D client, perhaps playing a 2D puzzle game embedded in their profile; while some may want to go the whole hog.

To prove the point, Emote already has one project in the works that capitalises on all of that (*see 'Have a launch', over the page*), put together with Swedish developer Avalanche using via a brand new a joint venture business.

MONEY MEN

But gameplay isn't Emote's only target – it has another big aspiration too, planning to significantly redress the balance when it comes to development finance. Informed by O'Rahilly's time at iFone (which he founded) and Rose's stint as Eidos' development director – and a shared history at Sony Computer Entertainment – Emote's plan is to, says O'Rahilly, to "bring a lot of the functions usually covered by publishers, but which due to changes in the industry aren't working today, to development via other means."

Specifically, that means collaborating with developers (and publishers, technology firms or IP-owners, where relevant) to create joint ventures and single-purpose vehicle companies. Such ventures, the two say, result in a more transparent relationship, with less grief than the traditional developer to publisher model. Says O'Rahilly: "It's a different profile revenue share which is more transparent for all and hopefully leads to earlier break-evens – which is where a lot of the current problems in games development are right now."

Of course, the SPV element is a common business strategy, often used in UK film production – but it's still an approach alien to games studios, the Emote execs say.

Explains Rose: "We've had a great reaction so far from developers. But there's still a lot of education to do, because studios have worked under an advance royalty model, and financed by a publisher balance sheet for so long. But give it three years and I think this will be the norm." And not just via Emote, the two add – although clearly getting their first helps them.

O'Rahilly adds that the shipping and construction industries do similar things; they borrow the money to build something and then make a return on it and, "unlike in games, at no point have they risked their company, or any company they are contracted with."

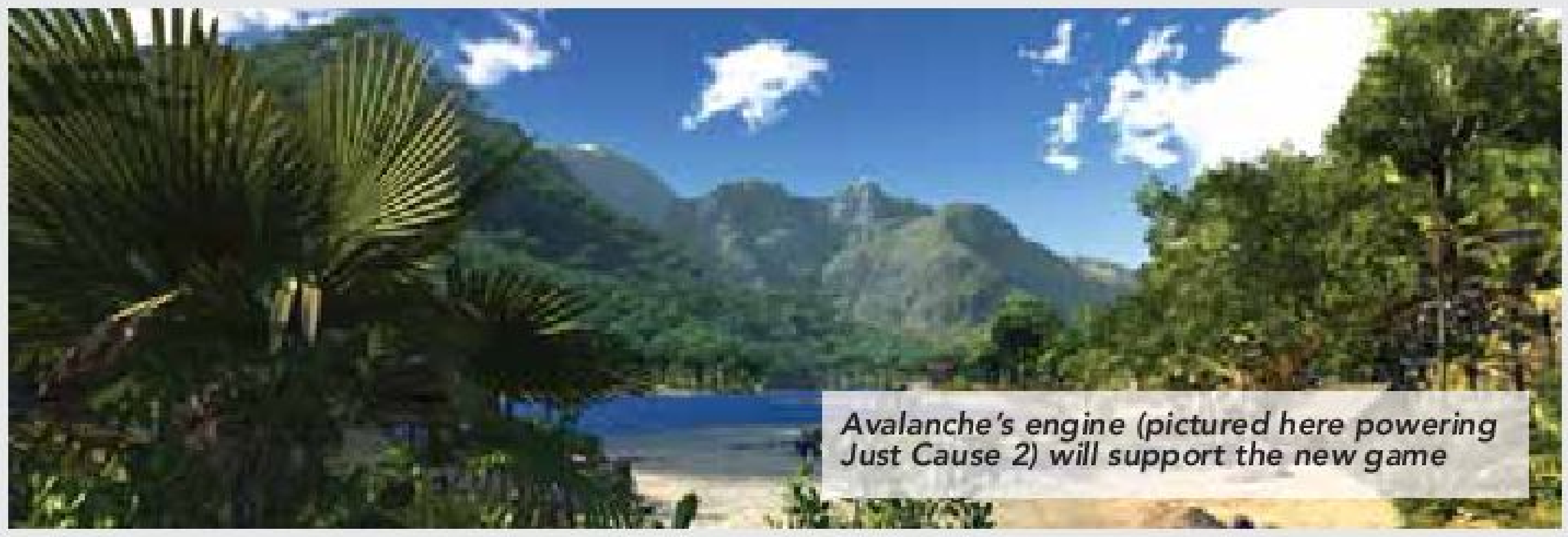
Emote consulted with Ernst & Young and UBS to help devise the asset model template that supports their joint ventures, and the company claims its approach means investment is repaid quickly and starts earning interest, so all investors make money sooner. Developers, publishers and other investors get their cheques at the same time – 30 to 40 per cent sooner, or 200,000 to 350,000 units earlier than a normal boxed game, claims O'Rahilly, "which

HAVE A LAUNCH

OF COURSE, EVERY INNOVATIVE new business model or technology – and Emote has both, don't forget – needs a first game to prove it works, and via a collaboration with Stockholm, Sweden-based studio Avalanche the company has project set for launch soon which is built on both its business and gameplay principles.

The two are currently working on an as-yet untitled game that incorporates everything Emote COO David Rose outlines below, consisting of 3D client (driven by Avalanche's proprietary game engine) connected to Emote's online and social games platform, all held together via a joint venture business.

The title will be targeting the PC and mobile spaces in the first instance, although a console will be a logical next step, says CEO Morgan O'Rahilly. He adds that version will be exclusive to one format when it appears – given both Emote execs' past at Sony and the PlayStation 3's more democratic/agnostic approach to online it's hard not to presume which one – although the PC version is the current priority.



Avalanche's engine (pictured here powering Just Cause 2) will support the new game

Most important about the endeavour is that the two execs say it proves Emote's point that the industry can make games quicker, more relevant, and with a better financing model.

The fast-speed testing/prototype elements harnessed by the Web 2.0 movement – where apps are constantly in Beta, but are hugely popular (hello, Gmail) and the likes of Flickr gets near-hourly server and code improvements to keep it up to date – are in full effect here, says Rose. Using the Avalanche engine and Emote's platform, the first running version of their collaboration was working in three weeks.

"Now, the actual speed of content development is moving to be pretty quick," adds Rose, pointing out that regular content can be introduced quickly and respond to player demands much faster than your traditional online patch.

The two also claim that Avalanche and Emote will be making money from their game much quicker than those titles which might have been in production for a longer period of time. And that seems to be before other elements such as optional pay-for-content or subscription models are factored into the mix.

---

is the size of the overlay games never tend to earn out from".

"The traditional earn out model doesn't work," he adds. "The developer gets $20m dollars to create a game with a 20 per cent royalty – but it needs to generate $100m before any money gets made. And it won't make $100m. It's completely inequitable. That doesn't help the publisher either, because to get that $20m they have to be so rigid and fixed in their contracting that they can't exploit incremental value, they're tied to retail and can't react to the market. It's over-reliant on a huge marketing spend to shove the game down consumers' throats. And then there's a problem with the acquisition men or your COO who wants to sign a game because they like it, or like the developer – they don't try to maintain hero brands or balance their portfolio. In other industries which have regular yearly investments you actually see that work much better – it isn't done very well in games."

The difference between the above – which could well be the backstory to any triple-A game and will be familiar to many readers – and Emote's pushing for joint ventures is stark, he says. "We seek out a solution that means every one going in understands transparently what is going in and what everyone gets out of it. In an SPV, everyone is asking 'how do we maximise the return on this' rather than thinking for just themselves; it becomes very intuitive and isn't about some marketing man dictating direction. Everyone has a share in a common entity. It also means deals are more honest and tailored. Plus it's more beneficial to digital and social gaming because that requires more disciplines and you don't tend to find all of them in one company."

"'Participative' is the greatest explanation of what we're trying to do in terms of the games and the business models," adds Rose.

EMOTIONAL BUSINESS

Given the new approach to business as well as gameplay, participative is certainly the word. As is ambitious. So we have to ask – isn't trying to change so many parameters so quickly a risk?

O'Rahilly doesn't think so, saying the industry just has to get prepared to start investing smaller, smarter and speedier than it has previously – acting more like the companies driving growth in the online space than traditional games publishers. And it all leads back to his earlier point about how broken and rigid current publishing deals are.

> ***"Facebook and MySpace done what game design should; they have taught people the familiarity of interfaces…"***

"Because people are taking balance sheet money you have to turn that around and answer to shareholders in a big way – you're saying you will get results much quicker. That's what kills it. It's not the fact you can't build things slowly and then quickly update the way web does – it's that your shareholders won't let you," says O'Rahilly.

"So it's not that publishers can't do it, but they have to educate their shareholders and get out of this rigid model where they are spending so much cash on a single finite thing that means they have no choice what happens next – they're spending $20m on the primary SKU, $10m on the others and $5m for the handheld. That's almost $40m. It's an enormous amount of money. And then they've just three months to sell it at retail. It's pump and dump in the classic sense – that method of thinking locks you into a certain way of thinking, but it creates a cycle which means evolution for the industry very difficult."

This, however, helps paint a backdrop against which Emote says it can thrive, both in a commercial and creative sense.

"Until recently the industry has lived in a retail-driven market – if we didn't, Emote and other developers wouldn't have the opportunity to try things this way," says Rose when talking about the investment side of the Emote philosophy, then adding when it comes to the gameplay side's embracing and extending the social networks zeitgeist: "What Facebook and MySpace have actually done for us is that they have done what game design requires – they've taught lots of people the familiarity of interfaces. They've taught people to work with multiple boxes of information on a single profile. In some respects Facebook already is a game, but people just don't realise that."

O'Rahilly adds: "Cross platform is hugely topical now. We've had mobile, Xbox Live, PlayStation Network and the likes of Steam – that all shows the industry is digital going digital. For too long we were digital going analogue. And now we have an ability to cross connect."

So everything about what Emote is doing is different. It demands a different attitude to a production pipeline, a production business, and a production philosophy. Whether or not O'Rahilly and Rose succeed at their plan or regardless of the industry's readiness for what is a fairly radical way to make a game, whatever happens the result promises to ensure emotions will run high.

www.emotegames.co.uk

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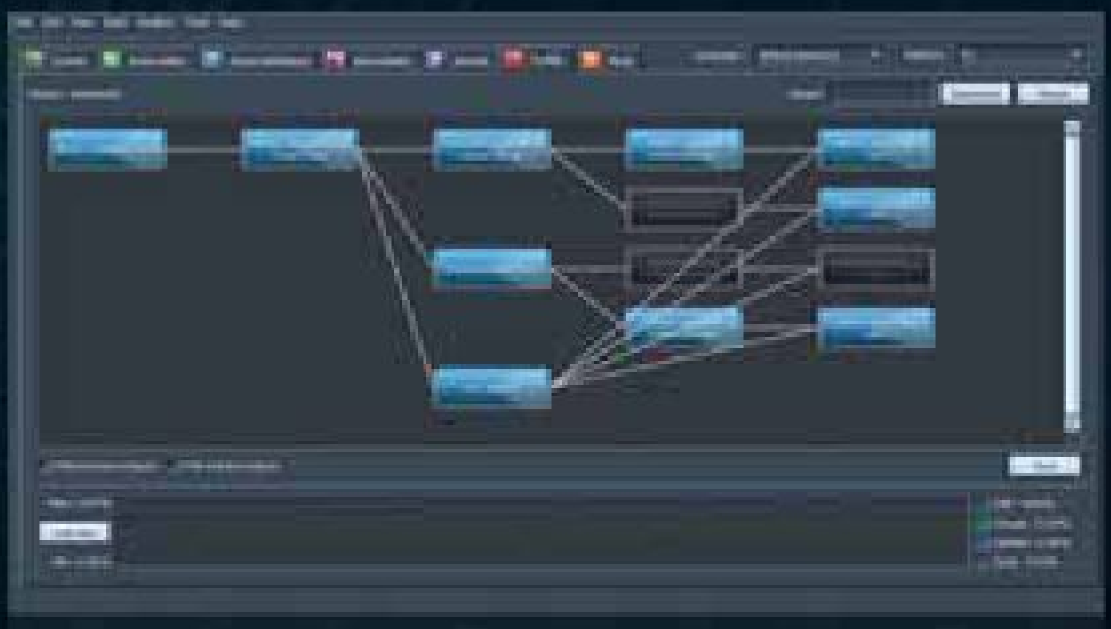

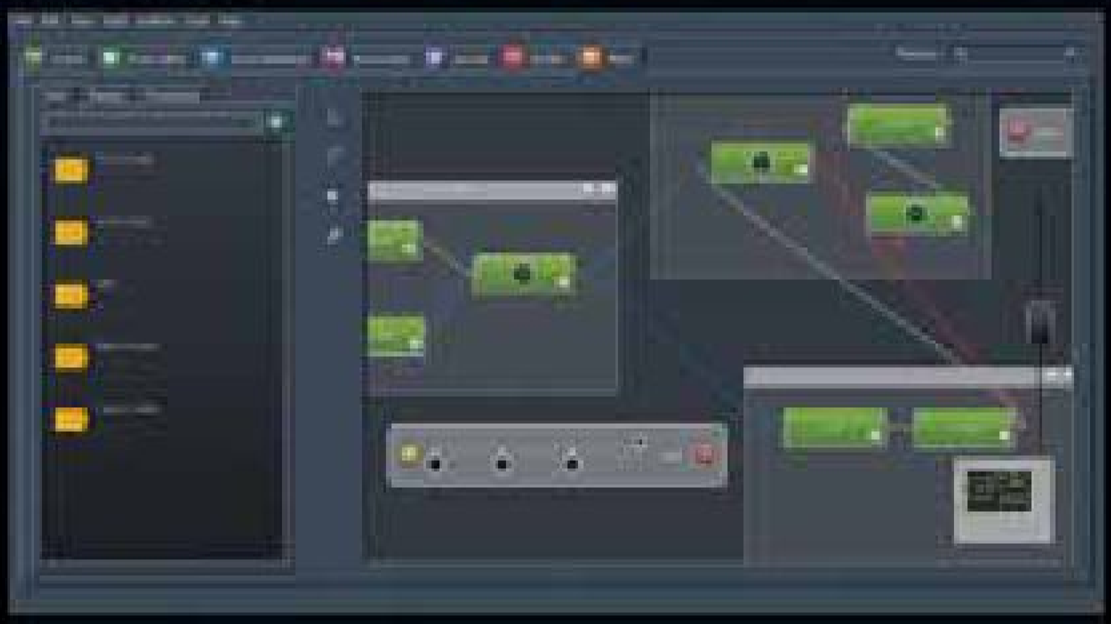

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100 to 1

So the Develop and ChartTrack calculators have been put to rest for another year, and now we know who 'won' the Develop 100. But apart from Nintendo's dominance what key themes and trends can we see in the list? **Michael French** has a look…

Now in its fourth year, the *Develop 100* has unquestionably become a must-read in the games industry. Beloved as much by studio heads as it is contract workers, the book has achieved truly invaluable status not just thanks to its acknowledging of success via a key metric – sales data – but also because it offers a fairly reliable barometer on the state of play in games development.

So what are the big stories in the 2008 *Develop 100*? There are a number of key trends. Perhaps the biggest is the resurgence of Japanese games developers in the West. Although there are the same number of Japan-based teams in the list as before (16), they this year account for more revenue (£338m in total over last year's £216m). Success for those studios was driven by games on the Wii and DS – indeed, Nintendo claims the top spot this year, and Sega Studios Japan gets its first top ten entry (at number nine) thanks to sales of its *Mario & Sonic* Olympic mash-up. Elsewhere, Japanese independents like Office Create (33rd) and Dimps (76th) received a boost thanks to their Nintendo-flavoured offerings.

> **"Growth for many studios comes from the rise of the casual gamer…"**

It's a radical change from a few years ago, when Japanese studios were lamenting the downturn of their local market and global fortunes. Now the likes of Konami (4th) and Capcom (15th) truly understand that to succeed games must have global appeal.

The success of these studios hasn't come at the expense of anyone else, however (except perhaps the bruised egos at EA Canada, which no longer claims the top spot on our list for the first time and has to settle for second place). Instead growth of revenues for many comes courtesy of the expanding games demographic, spurred by the Wii, DS and the rise of the casual gamer. Certainly, the number of UK studios in the list remains relatively unchanged, with the 26 Britsoft firms in the list accounting for some £223m revenues at retail.

The more democratic game nature of the games playing public also seems to be reflected in the way studios today are being run. One of the barriers we used to face when clarifying details for the list with ChartTrack was the insistence of some publishers to whitewash credits or attribution for the development of certain games. But that's quickly changing now. So while some of the thousand-strong development resources still exist on the list (such as the multi-team, consolidated studio bases as Nintendo, Konami, Sega Studios Japan, Ubisoft Montreal and Midway), it's more and more likely to see accountability handed to individual studios. So kudos to representatives at the likes of Sony Worldwide Studios and EA who insisted during my discussions with them that the likes of SCEA Santa Monica (93rd) and Black Box (6th) get their day in the sun, rather than be lost in a higher-ranking yet more anonymous entry on the list.

In fact, with more and more of the in-house studios in the list – such as Infinity Ward (5th) and Maxis (7th) – explicitly tying their success to the more independent attitude found at the likes of big bustling independents Bungie (8th), A2M (19th) or Realtime Worlds (48th), it poses a question: is the concept of 'in-house' and 'independent' (or 'them versus us' if you ask some) starting to disappear forever? Only time will tell. But, if nothing else, the *Develop 100* ensures that credit is given where due.

This is an extract of the analysis found in this year's Develop 100. *Your copy is free with this issue of* Develop. *You can also find more analysis on page 14 or at* **www.developmag.com**. *The full list is also online at* **www.develop100.com**

develop100

Posn.	Studio	Revenue*	Country
1	Nintendo	£129,830,000	🇯🇵
2	EA Canada	£68,780,000	🇨🇦
3	Ubisoft Montreal	£52,170,000	🇨🇦
4	Konami	£41,670,000	🇯🇵
5	Infinity Ward	£39,600,000	🇺🇸
6	EA Black Box	£37,310,000	🇨🇦
7	Maxis	£36,840,000	🇺🇸
8	Bungie	£31,450,000	🇺🇸
9	Sega Studios Japan	£27,700,000	🇯🇵
10	Traveller's Tales	£27,060,000	🇬🇧
11	Ubisoft France	£25,370,000	🇫🇷
12	Yuke's	£24,500,000	🇯🇵
13	Amaze Entertainment	£24,070,000	🇺🇸
14	EA LA	£22,490,000	🇺🇸
15	Capcom	£22,300,000	🇯🇵
16	Rebellion	£20,130,000	🇬🇧
17	EA Redwood Shores	£19,990,000	🇺🇸
18	Vicarious Visions	£17,560,000	🇺🇸
19	A2M	£17,500,000	🇨🇦
20	Hudson	£16,220,000	🇯🇵
21	London Studio	£16,100,000	🇬🇧
22	Treyarch	£15,700,000	🇺🇸
23	Intelligent Systems	£14,880,000	🇯🇵
24	EA Salt Lake	£14,830,000	🇺🇸
25	Sonic Team	£14,100,000	🇯🇵
26	Rockstar Leeds	£13,750,000	🇬🇧
27	Insomniac	£13,500,000	🇺🇸
28	Microsoft Game Studios	£13,470,000	🇺🇸
29	Sports Interactive	£13,280,000	🇬🇧
30	Game Freak	£12,880,000	🇯🇵
31	Codemasters	£11,730,000	🇬🇧
32	Namco	£11,540,000	🇯🇵
33	Office Create	£11,540,000	🇯🇵
34	Square Enix	£11,470,000	🇯🇵
35	EA Bright Light	£11,130,000	🇬🇧
36	Crystal Dynamics	£10,880,000	🇺🇸
37	Eurocom	£9,740,000	🇬🇧
38	Neversoft	£9,480,000	🇺🇸
39	IO Interactive	£9,430,000	🇩🇰
40	Radical	£9,300,000	🇨🇦
41	Next Level Games	£9,240,000	🇨🇦
42	2K Boston/2K Australia	£9,170,000	🇺🇸/🇦🇺
43	EA Tiburon	£9,122,000	🇺🇸
44	Evolution Studios	£9,116,000	🇬🇧
45	Epic Games	£8,890,000	🇺🇸
46	Backbone	£8,850,000	🇨🇦/🇺🇸
47	Blizzard	£8,640,000	🇺🇸
48	Realtime Worlds	£8,100,000	🇬🇧
49	HB Studios	£7,910,000	🇨🇦
50	Bizarre Creations	£7,430,000	🇬🇧
51	Relentless Software	£7,240,000	🇬🇧
52	Bethesda	£7,170,000	🇺🇸
53	Helixe	£7,050,000	🇺🇸
54	Midway	£6,960,000	🇺🇸
55	Juice Games	£6,870,000	🇬🇧
56	Sumo Digital	£6,760,000	🇬🇧
57	Harmonix	£6,480,000	🇺🇸
58	Valve	£6,360,000	🇺🇸
59	BioWare	£6,130,000	🇨🇦
60	EA Chicago	£5,880,000	🇺🇸
61	Digital Tainment Pool	£5,670,000	🇩🇪
62	Studio Liverpool	£5,650,000	🇬🇧
63	Altron	£5,629,000	🇯🇵
64	MTO	£5,628,000	🇯🇵
65	Rare	£5,360,000	🇬🇧
66	Climax	£5,330,000	🇬🇧
67	Criterion Games	£5,220,000	🇬🇧
68	Barking Lizards	£4,800,000	🇺🇸
69	Naughty Dog	£4,790,000	🇺🇸
70	Agenda	£4,750,000	🇯🇵
71	Starbreeze	£4,730,000	🇸🇪
72	Creative Assembly	£4,680,000	🇬🇧
73	Shiny Entertainment	£4,610,000	🇺🇸
74	Asobo Studio	£4,600,000	🇫🇷
75	EA Montreal	£4,560,000	🇨🇦
76	Dimps	£4,410,000	🇯🇵
77	Exient	£4,391,000	🇬🇧
78	7 Studios	£4,387,000	🇺🇸
79	Team 17	£4,190,000	🇬🇧
80	Lexis Numerique	£4,010,000	🇫🇷
81	Budcat Creations	£3,840,000	🇺🇸
82	Frontier	£3,800,000	🇬🇧
83	Blade Interactive	£3,750,000	🇬🇧
84	Magenta	£3,690,000	🇬🇧
85	Visual Impact	£3,650,000	🇧🇪
86	Ubisoft Romania	£3,580,000	🇲🇩
87	Paradigm Entertainment	£3,520,000	🇺🇸
88	Hal Laboratory	£3,350,000	🇯🇵
89	Relic	£3,120,000	🇨🇦
90	Savage Entertainment	£3,110,000	🇺🇸
91	Kuju Entertainment	£3,010,000	🇬🇧
92	Atlus Software	£2,940,000	🇯🇵
93	SCEA Santa Monica	£2,910,000	🇺🇸
94	Ninja Theory	£2,860,000	🇬🇧
95	Retro Studios	£2,800,000	🇺🇸
96	Tantalus	£2,790,000	🇦🇺
97	Marvelous	£2,780,000	🇯🇵
98	Blitz Games	£2,770,000	🇬🇧
99	Rockstar Vancouver	£2,730,000	🇨🇦
100	Planet Moon Studios	£2,710,000	🇨🇦

*** Revenues are the amount made at UK retail by the studio's games during 2007**

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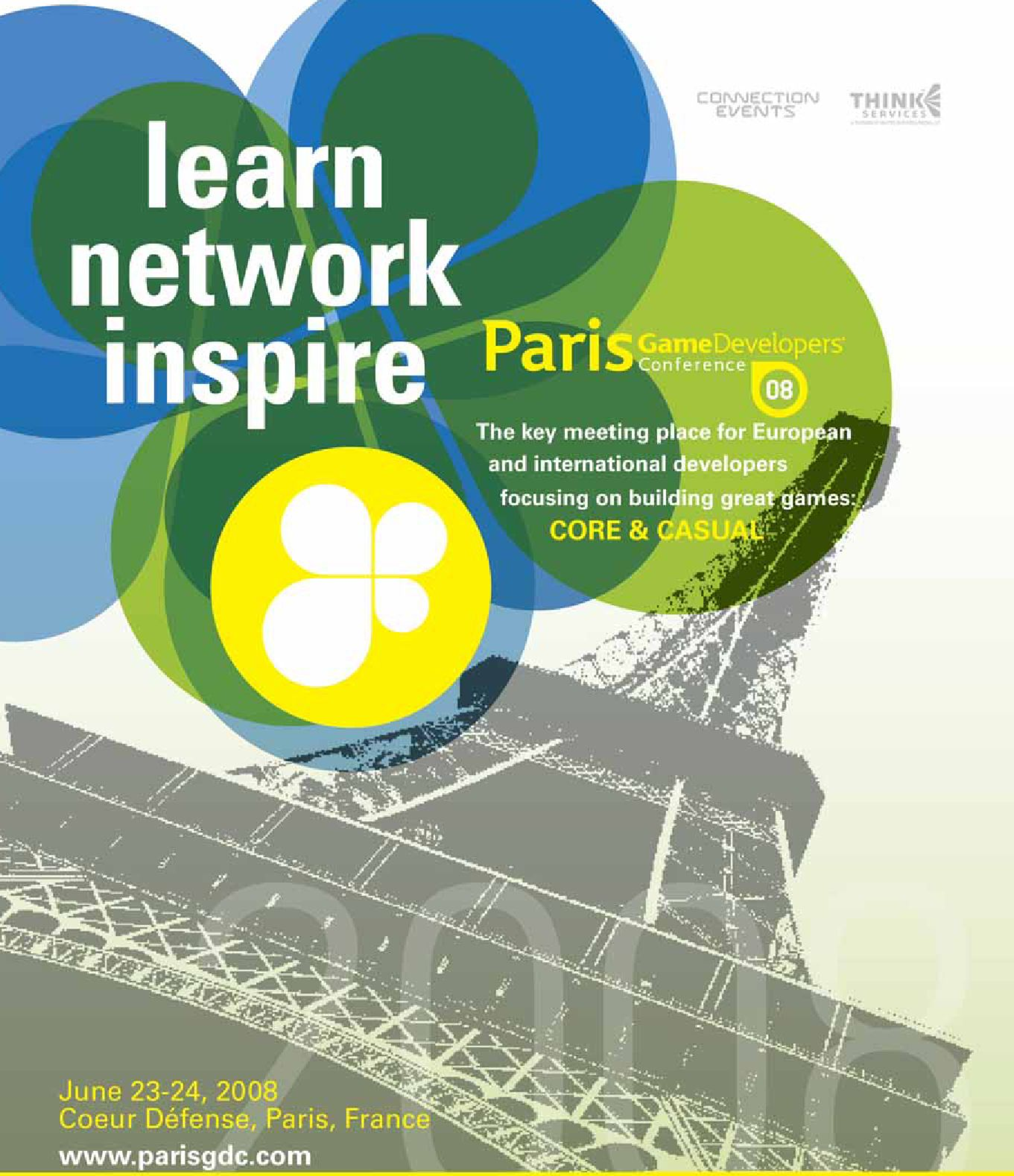

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INDUSTRY EXCELLENCE AWARDS

Want one of these?

The Develop Industry Excellence Awards return on **Wednesday, July 30th**. But what are the categories, how does anyone win and who won last time? Find out over the next five pages…

It's that time of year again, when the games development sector decides who has performed to the best of their ability the past year, be that in terms of IP creation, product quality, or general business smarts.

Now in their sixth year, the Develop Industry Excellence Awards once again take place in Brighton at the Hilton Metropole Hotel, on the evening of July 30th.

While there are a number of awards in this industry, the *Develop* Awards are the only peer-voted prizes for UK and European games developers which focus purely on creativity, teamwork and inspiring innovation. Not marketing. Not hype.

500 development execs attended last year's event, which is a key sign about how important the Awards are – ultimately, they belong to the industry, recognising the people who work in it. Your team, your studio, or your game – or your rivals' – could win. Plus, the prizes are always collected on the night by the people they reward, giving them their deserved moment in the spotlight.

So don't miss this opportunity to get involved. There are 17 awards this year, so take a close look. Then get lobbying…

TECHNOLOGY & SERVICES

TECHNICAL INNOVATION

WHO'S ELIGIBLE?
Any UK or European studio or company that has demonstrated impressive technical or creative innovation in its games released during the past year.

LAST YEAR'S WINNER
2007: Realtime Worlds *(Crackdown)*

PREVIOUS WINNERS
2006: Relentless/Sony External Development (*Buzz!*)
2005: Morpheme (Bluetooth Biplanes)
2004: SCEE (EyeToy/*SingStar*)

TOOLS PROVIDER

WHO'S ELIGIBLE?
Any company, of any nationality, that has released middleware during the past year enhancing or supporting the work of UK or European games development teams. Extra weight is given to new tools or significant version upgrades.

PREVIOUS WINNERS
2007: Havok

PREVIOUS WINNERS
2006: NaturalMotion
2005: Havok
2004: Criterion

GAMES:EDU NEW TALENT AWARD

WHO'S ELIGIBLE?
Any UK or European studio, company or organisation which has helped improve the quality of new talent entering the games industry, be that via initiatives, competitions, partnerships with other companies in the industry or training.

This is a new award for 2008 added to acknowledge the closer ties between games industry and educators and the schemes put in place by developers to continually improve the industry via education and collaboration.

SERVICES & OUTSOURCING

WHO'S ELIGIBLE?
Any UK or European company that offers outsourcing or other core games services supporting the world's games developers, such as testing, localisation, design, programming, bespoke character art, audio and the like.

LAST YEAR'S WINNER
2007: Babel Media

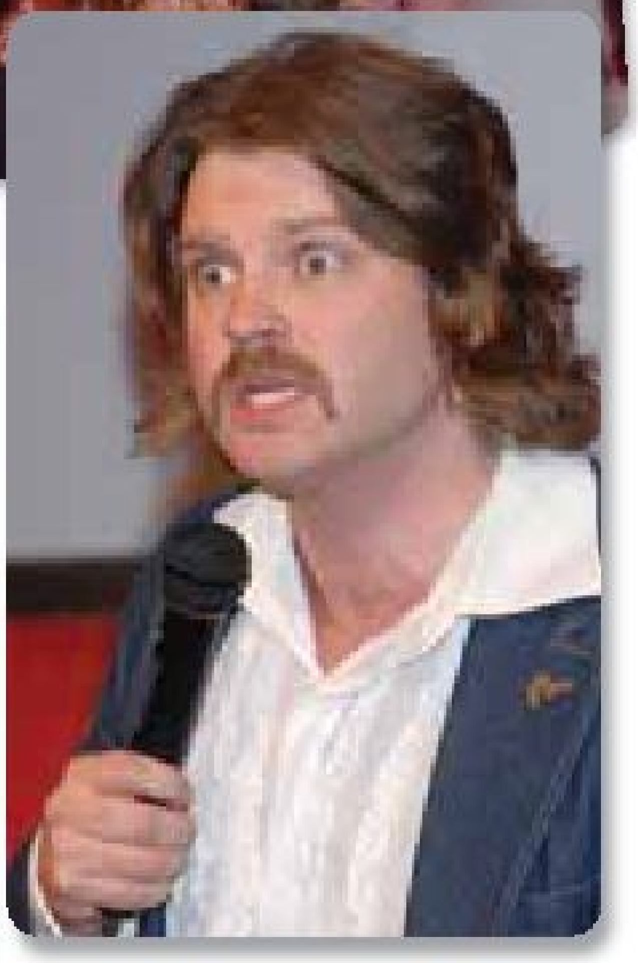
PREVIOUS WINNERS
2006: Side UK
2005: Babel Media
2004: Audiomotion

RECRUITMENT COMPANY

WHO'S ELIGIBLE?
Any UK or European company working in the field of recruitment and human resources that has successfully served the needs and demands of the European development community over the past year.

LAST YEAR'S WINNER
2007: Datascope

PREVIOUS WINNERS
2006: OPM
2005: Datascope
2004: Aardvark Swift



CREATIVITY

BEST NEW IP

WHAT'S ELIGIBLE?
Any UK or European studio-made IP that has introduced a new property to games consoles, portable devices or PC in the past year.

LAST YEAR'S WINNER
2007: *MotorStorm* (Evolution/SCEE)

PREVIOUS WINNERS
2006: Console IP - *Buzz!* (Relentless/Sony External Development)
PC IP – *Fahrenheit* (Quantic Dream)
2005: *Far Cry* (Crytek)

BEST USE OF A LICENCE

WHO'S ELIGIBLE?
Any UK or European studio that has introduced a quality game, regardless of platform, based on an external property in the past year.

LAST YEAR'S WINNER
2007: Traveler's Tales (*Lego Star Wars II*)

PREVIOUS WINNERS
2006: Ubisoft France (*King Kong*)
2005: Traveller's Tales (*Lego Star Wars*)

VISUAL ARTS

WHO'S ELIGIBLE?
Any UK or European studio or design/art outsourcing firm that has demonstrated impressive graphical and design work in the games or gaming content it has produced and released during the past year.

LAST YEAR'S WINNER
2007: Rare (*Viva Piñata)*

PREVIOUS WINNERS (BEST ART & AUDIO)
2006: Criterion (*Burnout Revenge/Black*)
2005: Criterion (*Burnout 3: Takedown*)
2004: Ubisoft (*Beyond Good & Evil/XIII*)

AUDIO ACCOMPLISHMENT

WHO'S ELIGIBLE?
Any UK or European studio, or company working in the audio space, that has shown pitch-perfect audio design and sound production skills in its output during the past year. Use of licensed and original tracks will also be taken into account.

LAST YEAR'S WINNER
2007: FreeStyle (*B-Boy)*

PREVIOUS WINNERS (BEST ART & AUDIO)
2006: Criterion (*Burnout Revenge/Black*)
2005: Criterion (*Burnout 3: Takedown*)
2004: Ubisoft (*Beyond Good & Evil/XIII*)

PUBLISHING HERO

WHO'S ELIGIBLE?
Any games publisher from any country, including outside Europe, that has supported the UK and European games development industry during the past year via the publishing, co-development and/or funding of new games.

LAST YEAR'S WINNER
2007: Sega

PREVIOUS WINNERS
2006: SCEE
2005: SCi
2004: Microsoft

STUDIOS

INDEPENDENT STUDIO

WHO'S ELIGIBLE?
Any UK or European games development company, which is not owned or managed by a publisher, working on any available game platform. Lobbying studios should have had some significant output in the last 12 months.

LAST YEAR'S WINNER
2007: Traveller's Tales

PREVIOUS WINNERS
2006: Traveller's Tales
2005: Traveller's Tales
2004: Crytek

NEW UK/EUROPEAN STUDIO

WHO'S ELIGIBLE?
Any new UK or European studio which has had its first game commercially released – either via retail or digital distribution – during the eligibility period. Companies don't need to have been founded during that period, however.

LAST YEAR'S WINNER
2007: Realtime Worlds

PREVIOUS WINNERS
2006: BigBig
2005: Juice Games
2004: Swordfish Studios

IN-HOUSE STUDIO

WHO'S ELIGIBLE?
Any UK or European publisher-owned games development company or in-house games development resource – including those acquired in the past year – working on any available game platform.

LAST YEAR'S WINNER
2007: Ubisoft France

PREVIOUS WINNERS
2006: Criterion
2005: Rockstar North
2004: Ubisoft France

MOBILE GAMES STUDIO

WHO'S ELIGIBLE?
Any UK or European games development company creating and/or producing games for mobile devices and platforms. Lobbying studios should have had some significant output in the last 12 months.

LAST YEAR'S WINNER
2007: Rockstar Leeds (as Handheld developer)

PREVIOUS WINNERS
2006: Gameloft
2005: Morpheme
2004: IOMO

BUSINESS DEVELOPMENT

WHO'S ELIGIBLE?
Any UK or European studio that has, in the last 12 months, improved its business significantly in the past year as proven by acquisitions, investments and/or steps to improve its output, efficiency and commercial performance.

LAST YEAR'S WINNER
2007: Blitz

SPECIAL RECOGNITION AWARDS

DEVELOPMENT LEGEND

WHO'S ELIGIBLE?

Any individual who has made a significant impact on games development – in a commercial, creative or technological sense – during their lifetime. The winner will have created significant game/games or managed/established leading company/companies.

LAST YEAR'S WINNER

2007: Ian Hetherington

PREVIOUS WINNERS

2006: Charles Cecil
2005: David Braben
2004: Peter Molyneux

GRAND PRIX

WHO'S ELIGIBLE?

This is a special award from *Develop*, bestowed upon a European individual or company in recognition of outstanding achievements in games over the past 12 months. The candidate is decided after soundings from the industry.

LAST YEAR'S WINNER

2007: Sony Computer Entertainment

PREVIOUS WINNERS

2006: Bizarre Creations
2005: Creative Assembly
2004: Sony London Studios

Awards FAQ

WHEN ARE THE AWARDS?

Wednesday, July 30th, 2008 at the Hilton Brighton Metropole.

HOW CAN MY COMPANY ENTER?

Simple. Send a short pitch as a Word document to *Develop*'s editor at Michael.French@intentmedia.co.uk
Give us a bit of history and highlight your company's key achievements – and tell us what awards you want to be considered for. But don't go into masses of detail. We know the industry well – and have probably heard of you.

WHAT'S THE ELIGIBILITY PERIOD?

For those awards criteria based on released products, please note that to be eligible titles must have been released somewhere in the world between July 1st 2007 and June 30th 2008.

WHEN IS THE DEADLINE?

May 15th

WHAT'S THE JUDGING PROCESS?

When the nominations are all in, they are appraised by the *Develop* editorial team. The team then decides upon a shortlist of five or six nominees for each award. Profiles of the shortlisted companies are then sent out (as a PDF) to a judging panel of almost 100 industry executives chosen by the magazine. The judges then disclose their first choices. Those with the most votes win.

HOW MUCH IS IT TO ATTEND?

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Contact: Simon.Harvey@bhpr.co.uk

Industrial actions

Games are hiring more and more staff from other industries. But how do we compare to these other mediums? FreeStyle Games' **David Costello**, who worked on The Lord of the Rings stage production, contrasts two sectors…

Hi, my name's David Costello and I'm calling about the Project Manager vacancy."

Developer/Agency: "Right, cool. So, what experience do you have? What games have you worked on?"

Me: "Well, I was producer on Lord of The Rings—" [Interrupted]

Developer: "—Great, I loved that game… especially the Battle for Middle Earth games"

Me: "I didn't work on the games, I was producer for the stage show – the theatrical version."

Developer: "Oh okay. What games have you worked on?"

Me: "I haven't…."

Developer: "…so, you're a theatrical producer, and have never worked in the games industry?"

Me: "Yes, that's correct – but I've played games all my life and I'm pretty certain you'll find my skills and experiences highly transferable to similar roles in the games industry."

Developer: "Well, that's great, but we really need someone with games industry experience."

The above is the type of conversation I had many times whilst making the transition from the theatre world to the games industry.

Of course, coming from a different industry, I did not expect finding the right role to be easy. There were three major factors to preparing to make the transition: I had to contextualise my experiences, express my passion for the industry and lastly, be persistent. I spent a lot of time absorbing as much background info on the industry as possible: reading, talking, networking, going to conferences/presentations, etc. I knew I would be met with scepticism, so it was important to frame my experiences in a games industry context as deeply as possible. This did get attention and put me in front of people.

Generally, I'd say that because of this preparation, 20 per cent of my efforts were positive. 80 per cent were along the lines of not being able to tick the 'do you have three triple-A games under your belt' box (this is where the persistence comes in). Nevertheless, for the 20 per cent, this preparation meant I was able to speak about my job history as if it were actual games industry experience. This in turn helped express my commitment and passion about the industry. In fact, expressing my commitment to the industry was key, as employers/agents would always test this to ensure I wasn't making some random career choice. It did help, of course, that I am a lifelong gamer and I treat gaming equally as a cultural force in my life as I do film and theatre (my wife would say more so…). Therefore, I have the same passion and excitement for working in games as I had for theatre.

I was lucky to find, in FreeStyleGames, an employer whose ethos is to find the right people rather than the right CV. I am in no doubt that it would be generally advantageous for the industry if the resistance to non-game industry workers was less than it is. This past year has only strengthened my belief that an open-minded view of people from other related industries will increase the wealth of knowledge, skills and therefore the quality of the games produced.

Indeed, having worked in the industry now, from a Project Management position, the differences and similarities between theatre and gaming are either notional or useful in actually perceiving and dealing with the challenges involved in game production. I've listed a some here.

***David Costello** is project manager at FreeStyle Games*

DIFFERENCES

■ Theatre investment is often private investment so fundamentally, as a theatre developer, you are responsible for the production, marketing and sales of a show. Obviously, a games publisher/developer relationship means the development studio is usually concerned with production only.

■ No unions in the game industry. A lot of time is spent in theatre ensuring and fulfilling the requirements of three unions; the Musicians Union, EQUITY (actors and stage management) and BECTU (technical theatre staff). This is not a political statement – the nature of film and theatre is freelanced-based which has certain benefits and disadvantages.

■ Pre-production in theatre is time-intensive but labour-light. Same as in gaming, but not quite. To break out this difference, *The Lord of the Rings* was in pre-production for over two years. In this time we were only a permanent team of five people and then a core technical and creative team of 15 people who worked freelance. We had some larger fluxes of people for one to four week periods to test technical elements or produce workshops, but essentially that was it.

■ The level of pre-production is tied to the scale of scope, finance and risk, and because of the advantages of a freelance industry, you look at pre-production to identify and resolve as many risk and technical issues before going into production. This is essential as production is only six to eight weeks. The games industry is finding ways to attain some of this flexibility as reflected in the increasing prevalence of outsourcing, which I'm no doubt will continue to mature.

■ Production time in theatre is labour-intensive when your team suddenly increases to the 100s. Okay, this doesn't sound like a difference but when you consider that production time is only six to eight weeks (i.e. rehearsals and getting all the lighting, sets, computers, orchestra etc. set up on stage) this is a major difference to games. After production time you have running production, which is the period the show runs every night to a paying audience. This can be anywhere from six weeks to years. This is when the management becomes about marketing, sales and maintaining the show. At this point you are then looking at the next show to produce. Then there's touring productions…

■ Independent theatre producers also manage and oversee areas such as licensing, marketing, sales, return on investment, royalties, accounting of a production, etc. Much of this is obviously the publisher area of responsibility in games. I've certainly found this experience to be useful in managing how the publisher's relationship and responsibilities impacts our studio.

■ To some extent games entail being in production and pre-production at the same time. Of course we still see these as distinct areas of development, but all I mean is theatre tries to tackle a lot more detailed issues in it's definition of 'pre-production' than we do in the games industry. We can't copy the theatre model, as the reason it works the way it does is due to theatre's idiosyncrasies. When your game studio has a team of 60 people that your publisher is investing in, you can see the imperatives for being in 'production' not 'pre-production'. So game development accommodates both to some extent. Strangely, this general comparison does help tremendously in the way I view and resolve the challenges of game production. It also makes me aware that, short as it usually is for games, pre-production is a necessity for successful development both for developer and publisher, an ethos we maintain at FreeStyle.

SIMILARITIES

- The underlying factor is the games industry is a creative industry first and foremost, as is film and theatre. The trick is to foster this in a framework of good commercial and management practices but not at the expense of creativity, which at the end of the day makes the industry what it is and makes coming to work worthwhile.

- As any project manager or producer knows when dealing with a large, complex production, your job isn't necessarily to understand and solve every issue that is inherent in a creative enterprise. The trick is to communicate and bring key people together that can help you make decisions and get things done. In this aspect theatre, film and games are aligned and this experience helps in communicating and planning theatre productions and carries through to game production.

- Scheduling and predicting accurately the needs of complex creative production is never accurate. Therefore, finding ways to embrace this conundrum rather than fighting it is important to both industries. This is a similarity and a difference to some extent. The nature of theatre's pre-production, freelance workforce and short production times means you have agility in pre-production but next to zero in production. The games industry is obviously finding ways to deal with it's production/pre-production nature. The hot topic is introducing Agile methodologies such as Scrum to your studio, but there is the age old trick of risk management and allowing for the unknowns in your time estimates and predictions to a publisher. To me, there's something in looking across the board at different methodologies and practices and moulding what suits the individuality of your studio and the work at hand.

- Everything works better when developer and publisher share an overarching vision of the game, and your publisher buys into your studio and ethos as well. In theatre, we applied the same to investors who have less impact on your work than publishers can, but who it was still important to engage with them fully in what you do. As with theatre, if you can foster a good publisher relationship it so aids development, planning, and dealing with change, and of course establishes trust and future relationships.

- It helps immensely to be passionate about your industry. I spent a year exploring the industry before really attempting to move into it but there was no way I would have done if I couldn't also be passionate and knowledgeable about video games in general.

- It's a team thing. The value of your company essentially comes from your team. Reflecting an equal respect and value to each individual as part of this team is key to both industries and is something that the last company I worked for in theatre and the first in gaming both adhere to.

- There is something exciting about working for independent companies. I worked for various theatre and TV companies and with independents. At an independent you feel you can invest in what the company is doing, what it does and that there is a value in your contribution. I certainly feel fortunate that FreeStyleGames has and maintains this ethos and that it is important enough for it to be a large part of how we are currently planning to expand.

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- **Jonathan Smith,** Travellers Tales
- **Andrew Eades,** Relentless Software
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THE LATEST TOOLS NEWS, TECH UPDATES & TUTORIALS

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Bad Company, Great Audio

How EA DICE is preparing for the next generation of audio, p57

Third time lucky?

HAVE YOU HEARD THE rule of thumb that a technology company needs three releases of a product before it finally begins to gain the success the founders originally hoped for when they set out on their middleware adventure?

The first release will be the outpouring of enthusiasm and inexperience and lacking in terms of fitting into professional workflows – let alone being polished enough. The second is usually even worse – either rushed or introducing new cutting-edge features that unbalance the whole. Only when it comes to number three will the specks of gold born of previous failure start to shine out, at least if your company has survived that long.

I think the theory was inspired by talking to the lads at Criterion when they were explaining the failed releases of RenderWares 1 and 2 and starting to bask in the glory of RenderWare 3.

It's an ancedoctal approach that roughly seems to work, though. It's taken Epic three goes to become the industry's *de facto* engine standard for example, while Havok's physics engine wasn't very robust or full-featured until continuous collision detection was introduced in version 3.

But more than the number of releases per se, the underlying point is it takes a lot of time and investment for any technology company to make its mark. Which makes me wonder why anyone bothers starting out down the road.

But despite the current trend which seem to suggest games technology companies also developing their own games are the most successful – again think Epic, also Crytek, Simutronics, even NaturalMotion? – this issue of *Develop* sees the debut of two new companies. It will be interesting to see how Audio Factory and Simul get on.

Jon Jordan
jon.jordan@intentmedia.co.uk

< CODING >

LOOKING TO THE HEAVENS

Feeling overcast? New outfit Simul wants to serve all your Cirrus and Stratus needs…

AS COMPANY FOUNDER RODERICK Kennedy points out, in many games the sky could take up half the screen, and yet it's not an area that's been overwhelmed with experts offering technology. But now a personal project, nine years in the making and covering the period during which Kennedy worked for DID and Evolution Studios, is looking to change this.

"With the advent of real-time weather effects, developers are starting to take a strong interest in getting skies and clouds right, especially as they feed into scene lighting and high dynamic range," he says.

The first product from Simul is the standalone cloud rendering solution CloudWright. Currently set up using the open source OGRE 3D graphics engine as its renderer, it enables you to produce skyboxes with features such as physically correct time-of-day sky colouring, procedurally-generated 3D volumetric clouds and anisotropic haze and fog. The clouds can be rendered out as hdr images, jpegs, transparent tgas and dds cubemaps, or combined with sky gradient rendering to jpegs, hdrs and tgas.

"We're looking at adding time-lapse animations, as well as working on CloudWright plug-ins for the major rendering packages, which would produce a much higher level of detail for films, TV, architectural rendering," Kennedy explains.

The current focus of the company however is the Clouds SDK; the version of the technology that's available for integration into PC and console engines.

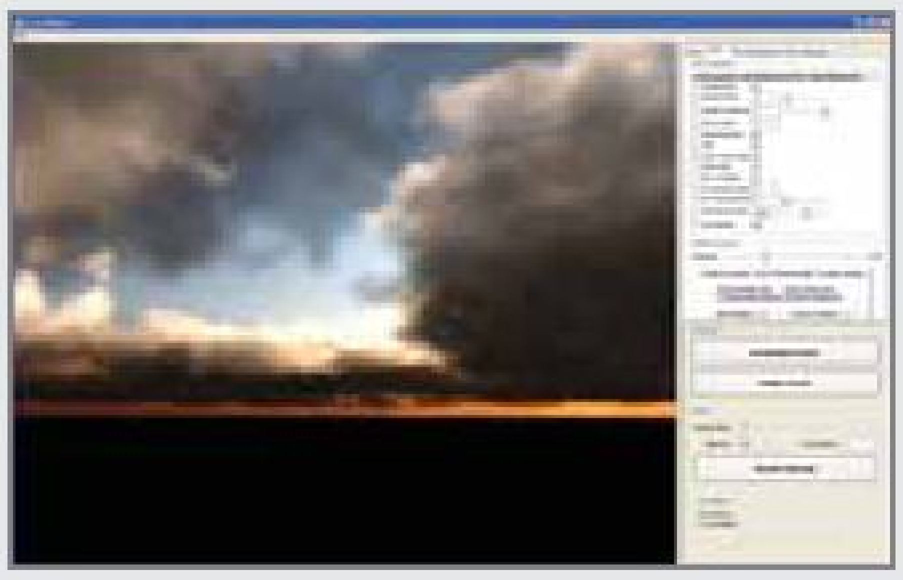
"We expect the integration process to be easy because the SDK is built via our Simul Framework, which makes it simple to develop and deploy independent software components because we separate the interface from the implementation.

"As such, the functional cloud object is self-contained and sits behind a simple interface," explains Kennedy, who adds the company has already sold its first license.

This flexibility means you could use Clouds for one project, but for the next, completely replace it with an in-house solution using the same interface and not have to change the render code. Or, alternatively, keep using Clouds and revamp the render code.

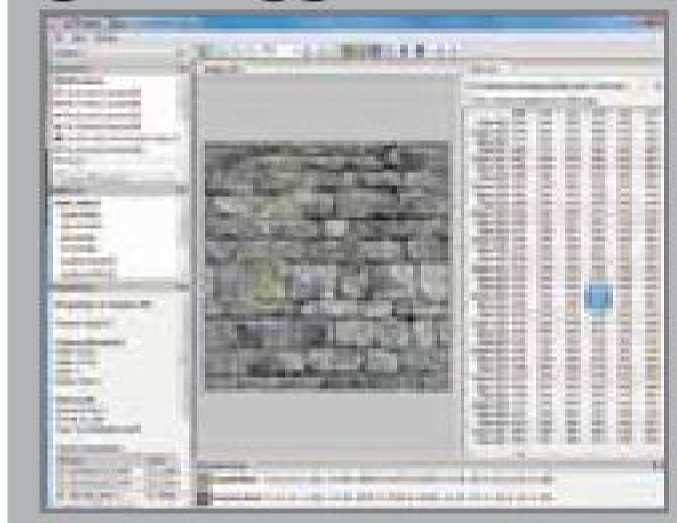
"The intention is to make the best real-time clouds," Kennedy states. "They are difficult to get right. It took us 18 man-months of research but we feel we've got a great solution."
www.simul.co.uk

CloudWright/Clouds SDK



Price: $80/Available on request
Company: Simul Software
Contact: +44 20 8133 6920

gDEBugger v4.0



Price: From $670
Company: Graphic Remedy
Contact: info@gremedy.com
www.gremedy.com

Version 4 of the OpenGL debugger, gDEBugger, comes with added support for 32- and 64-bit Linux, and Windows Vista SP1, as well as a new textures and buffers viewer and performance and usability improvements.

The viewer allows you to view all render context textures, including 1D, 2D, 3D, cube-map and rectangle textures, static buffers and pbuffer (pixel buffer) objects as images or raw data. This means each object can be viewed both as an image in the image view and as a spreadsheet containing the object raw data in the data view. Support is also added for Nvidia's PerfKit 5.1.

Torque X 2.0

Price: From free
Company: GarageGames
Contact: +1 541 345 3040
www.garagegames.com

Continuing its development of tools for people working on games for XNA deployment, the latest version of GarageGames' C# engine completes the update process from the company's original engine, and brings compatibility with the XNA 2.0 framework. This brings an improved content pipeline, the ability to choose multiple render targets and faster rendering performance. There's also a simplified deployment process to the Xbox 360, while consistent behaviour between it and Windows is greatly improved. Torque X 2.0 works with Visual C# Express and all variations of Visual Studio 2005.

< ART >

PERFECT EMISSIONS

3ds Max particle effects plug-in AfterBurn provides smoke without fire…

IT MIGHT SEEM LIKE a niche, but there's plenty going on in the small but perfectly-formed world of particle effects. In real-time there are dedicated middleware engines but, more generally, the tech is being used to generate a lot more than showers of sparks.

There's a similar expansion happening in the offline world too, with the latest version of 3ds Max plug-in AfterBurn being released. A particle-based volumetric solution, it's been used in plenty of films, as well as cinematics for games such as *Warcraft* and *Hellgate: London*, to generate effects ranging from clouds, pyroclastic smoke and explosions to liquid metals and procedurally-defined hard objects.

One of the key areas of improvement in version 4 has been shadows. There's a new Shadow Map, which brings a substantial speed improvement without significant shadow quality loss, while the performance jump when it comes to raytraced shadows is claimed as five-fold for dynamic scenes. The process of setting self-shadowing has also been integrated into the standard light's interface so you no longer have to use special shadows.

Other features include the Octane Shader, which has been designed to offer fast and efficient rendering for thin smoke and other effects that don't require full 3D shading. The built-in noise types have been completely reworked and are now provided in an open plug-in form.

AfterBurn 4.0

Price: $135 upgrade, $545
Company: Sitni Sati
Contact: +385 1 3865 284

Finally, the package has been further exposed to MAXScript interaction, particularly in terms of Animation Flow Curves and Gradient controllers.

www.afterworks.com

Grome v1.2.

Price: €299
Company: Quad Software
Contact: sales@quadsoftware.com
www.quadsoftware.com

The point release of the Grome terrain modeller brings the usual array of new features, but the headline is the underlying optimisation which Quad claims improves operations such as shadowmap generation and fractal filters by up to ten times.

Another focus has been exporting, with the addition of an intelligence plug-in, while the ease of use of the SDK has been aided thanks to a scripting language that enables you to apply tools, change parameters and automate tasks.

Fractal filters can now be applied to your terrain too, using Grome's customisable brushes, providing additional flexibility.

Deep Access

Price: Free with Deep Server
Company: Right Hemisphere
Contact: +1 925 460 8133
www.righthemisphere.com

An add-on module for Right Hemisphere's Deep Server, Deep Access is a web-based digital media asset management system.

It provides an interface to the process automation solution enabling you to perform tasks such as version control check-in and check-out, as well as allowing collaborative viewing and mark-up for 2D and 3D assets. Other tasks include organising data through user-defined metadata searches and customisable reporting.

Deep Access can also be extended into other tools using the Right Hemisphere SDK, and link into other authoring tools so you can check out, download and edit your assets.

< AUDIO >

SOUNDS FROM THE SILENCE

Audio Factory hopes to make a big noise with synthesised audio effects…

THE WORLD OF AUDIO always seem to be ripe for new approaches, and over the years, one of the most tantalising has been the promise of throwing out pre-sampled sound libraries and replacing them with synthesised effects. The latest company to take up the challenge is the Israeli-based Audio Factory, which has been accepted into incubator The Targetech Innovation Center.

Audio Factory is working on a system based on computing the interactions of the various environmental sound sources from the data available from a game's graphics and physics engines. It's still early days for the technology though, which isn't expected to be revealed until the autumn, but CEO Philip Morris confirmed the system will consist of an SDK for developers and an audio hardware component for gamers.

"We intend to change the way that special effects are produced and generated, with all the various limitations and memory restrictions inherent in a system based on using other sources for samples," he explains.

When asked about how such a hardware philosophy was likely to pan out in light of Ageia's recent experience in the physics space, he replied: "Ageia was bought by Nvidia, who have valued the company very highly from a technical and commercial point of view."

Audio Factory

Price: TBC
Company: Audio Factory
Contact: philip@audiofactorysound.com

As to the further issue of Creative's domination of the PC sound card market, Morris said Audio Factory was not looking to compete with Creative.

www.audiofactorysound.com

Peak Pro 6

Price: $599
Company: BIAS
Contact: +1 707 782 1866
www.bias-inc.com

Peak Pro, BIAS' audio editing, processing, mastering and delivery software for Mac OS X, has hit version 6, with features including an enhanced playlist with functionality such as new cross-fade options and volume envelopes; new DSP sound design features, editing and delivery enhancements and a sleek user interface. Additional processing tools include the Perpetual Looper, for the creation of beat free sustained loops, the automatic Voiceover Ducking, which drops the volume of background sources compared to a voice, and ultra-fast Cache in RAM editing option. It also allows easy export of playlist regions directly to iTunes.

REFLECT v1.4

Price: €169
Company: VirSyn
Contact: +49 7240 202956
www.virsyn.de

The new version of VirSyn's PC/Mac algorithmic reverberation plug-in includes a new routine for position sensitive early reflection patterns. This improves the localisation of separately positioned sound sources to create a more realistic simulation of how sound interacts with large physical spaces. In addition, the new built in channel mixer improves REFLECT's usability in the production workflow.

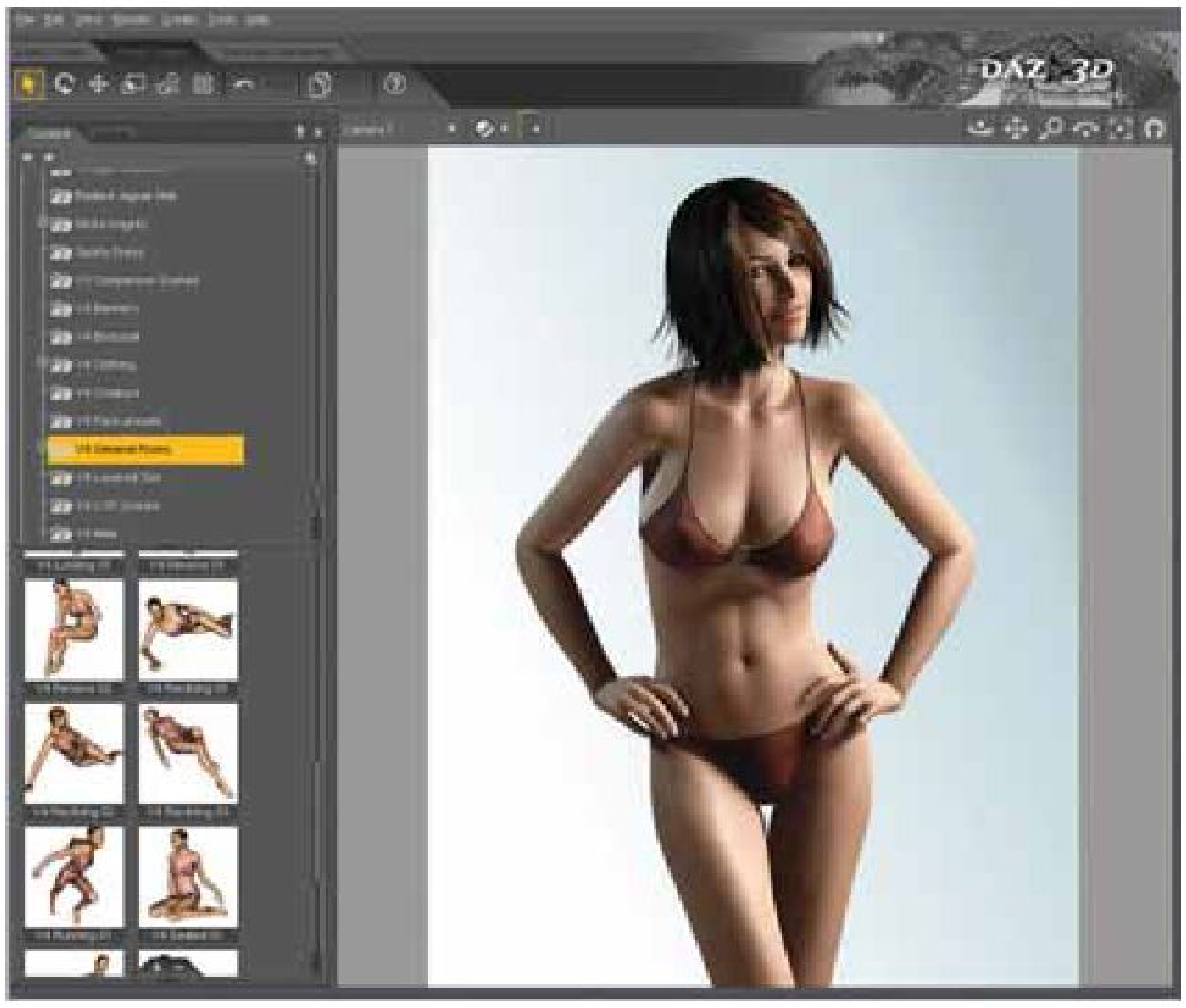
Support is also added for Steinberg's Virtual Studio Technology 3, which allows for arbitrary input/output channel configurations up to 12 channels including 5.1, 7.1 and 10.2 Surround. Other supported plug-in standards are AudioUnit and RTAS.

KEYRELEASE

PRODUCT: MogBox
COMPANY: Daz 3D/Mogware
PRICE: Free
CONTACT: +01 801 495 1777
W: www..daz3d.com

Less a box, more a pipe

Getting Daz 3D content into games has never been easier, thanks to MogBox…



A couple of years ago, 3D art companies spent a lot of time talking about pipelines. The term 'pipelinability' may even have been uttered. The widespread adoption of standards such as COLLADA and FBX, plus consolidation, have since dampened down such talk, but that doesn't mean they're not still relevant to certain parts of the industry.

One such is the increasingly sophisticated entry-level/prosumer art tools such as Daz 3D's free Daz Studio. The company claims it has over 700,000 registered users, 375,000 opt-in subscribers and 37,000 active customers, and as well as linking into Daz 3D's professional tools such as Bryce also uses the highly popular Victoria and Michael virtual female and male stock characters, so the ability to get content out cleanly is a priority.

"Daz 3D has a large library of inter-compatible 3D content but it's only provided in certain formats and optimised for high-resolution, pre-rendered output. Standard interchange formats, like our FBX and COLLADA exporters, can't handle some of the processes required," explains Chad Smith, Daz 3D's chief strategy officer.

"We didn't want to limit our store to one specific format or have to customise our library manually for every platform. We needed to find a way we could continue to provide thousands of high-quality items. MogBox opens the door for Daz 3D content to be the first solution for all 3D environments."

Formally described as an automation toolset, MogBox is an under-the-hood piece of technology for Daz Studio that enables users to export to supported platforms while ensuring the output is as close to the original high-resolution content as the target environment will allow.

Developed by Mogware, a Utah-based 2005 start up from two game veterans, John Renstrom and Kier Knowlton, MogBox is a specific implementation of their wider content automation technology, called MOG, which has already been adopted by the likes of BioWare and integrated within Unreal Engine 3.

"MogBox was built from the ground up to be extendable," says Knowlton. "From its open architecture to its reusable processing components, MogBox should be a snap for any developer to leverage the work that Daz 3D and Mogware are doing."

> ***"Standard interchange formats can't handle the processes required…"***
>
> ***Chad Smith, Daz 3D***

In this particular case, much of the nuts and bolts revolved around issues such as mesh decimation, texture reduction and skeleton merging.

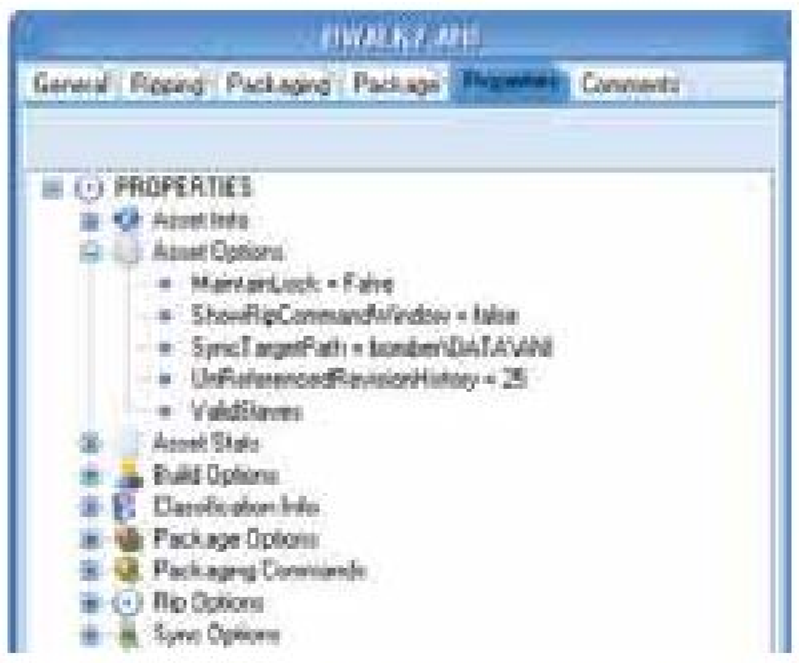
"A good portion of the Daz 3D models had to be massaged and manipulated in a fast yet automated way. But while most of this was rather straightforward; the biggest challenge was the polygon reduction of clothes and objects," Knowlton reveals.

Of course, the longterm success of MogBox will be measured by the amount of direct support it gains from other companies. The first to officially announce integration has been MMOG and virtual world platform The Multiverse Network.

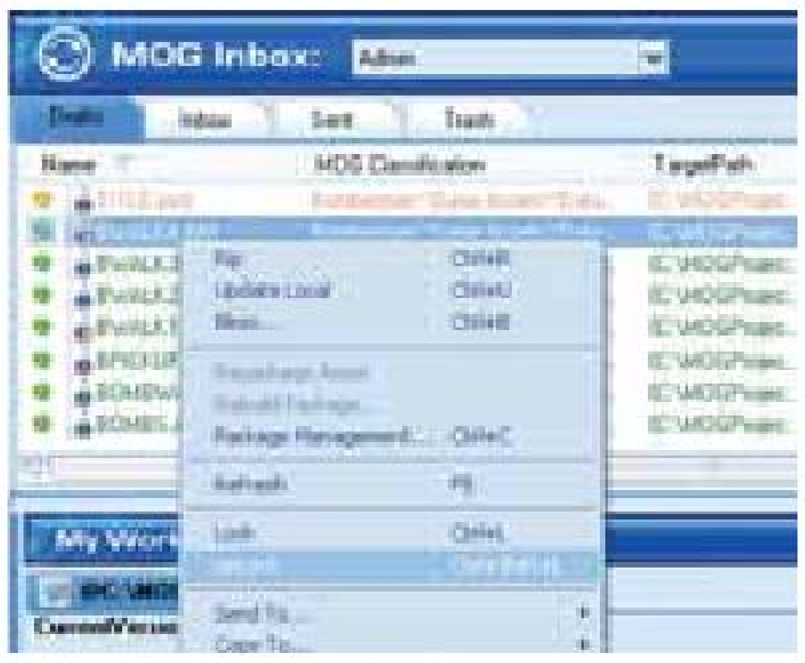
"Though we're not ready to make any announcements just yet, we are in discussion with many of the major players within the industry," reckons Chad Smith. "We can do quite a bit without the direct involvement of game companies, especially for games with open environments, although partnerships and support will make this much more visible and easier for the end user."

He also hopes the combination of Daz 3D content and MogBox will enable opportunities for indie and the smaller professional studios. "We spoke with many of the top industry players at the recent Game Developers Conference, and they seemed very interested in this solution," Smith says.

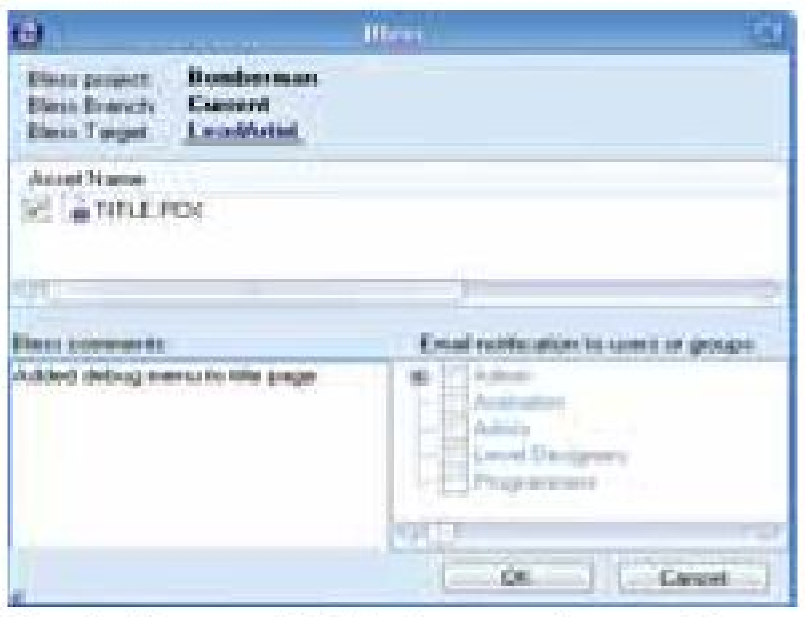
"Access to the Daz 3D library via MogBox could prove to be absolutely necessary for many smaller game producers; saving time and cutting costs are always huge concerns for anyone in this industry."



Top: In Mog, each asset's properties are used to ensure correct platform-specific processing



Middle: In team situations, assets can be locked to ensure exclusively



Bottom: The blessing process enables administrators to keep control of the project flow

Transmogrify your pipeline

The naming process for a company or technology can be a tricky process but neither Multiplayer Online Games, the series of children's books about a cat, *Final Fantasy's* moogles nor even a certain Glaswegian post-rock band were the inspiration for Mogware, base product MOG or MogBox. Instead, it was a sensible shortening of the overly wordy if technically correct term Transmogrifier.

At least the goal of the company and its tech is perfectly clear.

"As games get more complex and two year development timelines don't change, something has to give," says founder Kier Knowlton. "Mogware believes that creating games the old way, with more manpower, will deliver games that are over schedule, under developed, and ultimately less creative. With more automation and better designed asset management systems, game designers can return to making games instead of mindlessly twiddling bits.

Modern code compilers are filled with efficiency tools for programmers, whereas game content designers are still tasked with archaic naming conventions and manual conversion processes. Modern games are 95 per cent content and 5 per cent code; with that kind of ratio it is a shame that artists are forced to use programmer-centric hand-me-downs to improve their efficiency."

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ANALYSIS & METRIC TOOLS

Getting the numbers

Data is everywhere, but turning it into information is the trick of the new breed of game-focused analysis and metrics tools…

It's a truism to say games are becoming more complex. By their very nature, games are always becoming more complex, but the past couple of years have seen titles such as *The Elder Scrolls IV: Oblivion*, not to mention *World of Warcraft* and the like, which force developers to deal with the complex interactions of complex systems – something that can't simply be dealt with by lots of clever designers armed with Excel spreadsheets.

The result is the emergence of specific tools designed to make sense of the vast amount of data available, whether that's gameplay issues such as difficulty spikes and broken level progression or more technical details such as bandwidth and server performance.

Many of these solutions have come from the enterprise market, notably the finance and military sectors, but there are some small game-specific companies emerging as well. Of course, what makes the most sense is for such systems to be integrated within existing middleware, so relatively inexperienced game developers can get their heads around the issues.

It's something the online experts at Simutronics have been doing, with StreamBase's Stream Processing Engine and SL Corp's Enterprise RTView both included as options within their HeroEngine MMO platform.

+7 SYSTEMS

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+7 Balance Engine
CLIENTS
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COST
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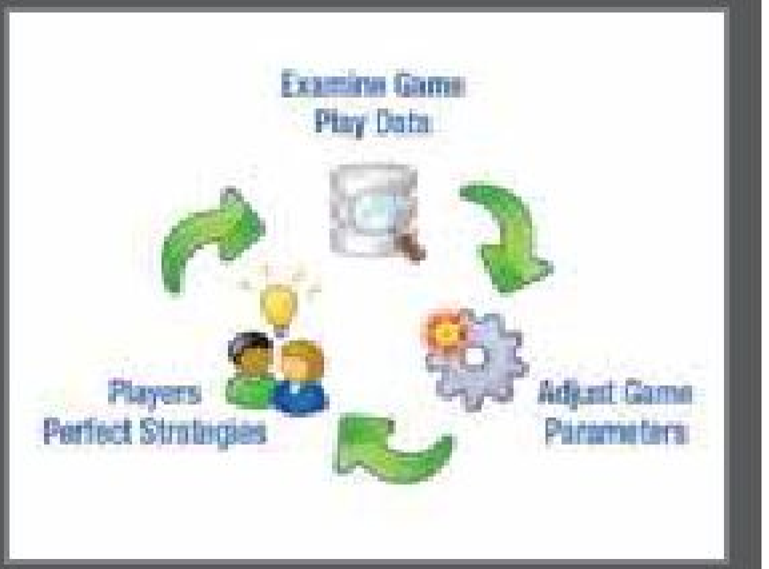

The +7 Balance Engine offers dynamic gameplay balance

www.plus7systems.com

One of the first companies to offer gameplay balance control technology, +7 Systems' focus has been with working with studios working on MMOs, an area in which it's recently signed its first commercial deals.

It can, however, be applied to any multiplayer games that require designers to continually offer gameplay diversity. It tracks how the game is being played and automatically rebalances it to ensure dominant strategies don't develop.

EMERGENT

TECHNOLOGY
Metrics Element
CLIENTS
BioWare
COST
Available on request
CONTACT
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Metrics Element provides a web-based interface for game data

www.emergent.net

Designed as a standalone component for the collection, analysis and sharing of game data, Metrics Element is also part of Emergent's modular development technology. The web-based application, which is particularly designed for online games, sits between the game and server and is designed to provide information about how the game is performing and the deployment infrastructure. It has recently received a major revision.

STREAMBASE

TECHNOLOGY
Stream Processing Engine
CLIENTS
BioWare, LindenLabs, Simutronics
COST
Available on request
CONTACT
+44 20 7190 1713

StreamBase Studio provides the visual interface for data

www.streambase.com

Used traditionally by financial institutions, StreamBase's Complex Event Processing software is increasingly catching the all-seeing eyes of the big MMO developers thanks to its ability to offer real-time monitoring of issues such as in-game currency transfers, bandwidth usage, system latency and load balancing. It can also help in terms of handling malicious player behaviour and maintaining the integrity of user-generated content, solving several headaches at once.

that matter

SL CORPORATION

TECHNOLOGY
Enterprise RTView
CLIENTS
Simutronics, StreamBase
COST
Available on request
CONTACT
+1 415 927 8400

Enterprise RTView is a data visualisation platform

www.sl.com

Compared to other analysis systems, Enterprise RTView ensures that real-time data collected is properly displayed.

In this manner, it's marketed as a visualisation platform that enables you to create custom dashboards, alerts and reports with minimal coding, and then deploy and seamlessly integrate them into a variety of existing environments.

It consists of data and display servers, Rapid Enterprise RTView Builder tools and a data historian.

METAFORIC

TECHNOLOGY
Game Design Notation
CLIENTS
Not applicable
COST
TBC
CONTACT
info@metaforic.com

Metaforic's goal is similar to Valve's Half-Life 2 difficulty graphs

www.metaforic.com

Publicly announced at a talk during 2007 Develop Conference, and then again at 2008's Game Developers Conference, the Game Design Notation project is based on ongoing research being carried out by Scottish company Metaforic, together with IP creation institution ITI Techmedia.

Its goal is to develop an easy-to-use methodology, based on a formal notion system, to enable designers to create and modify games terms of issues such as difficulty and fun.

Helping Coders Innovate

by David Jefferies
Black Rock Studio

THIS YEAR AFTER GDC a few of us travelled down to visit the Walt Disney Imagineers. Ever since becoming part of Disney we've been eager to hook up with these guys who are the creative heart of the company, given that it's the research and development centre responsible for creating the Disney theme parks and new media technology projects.

I've written before about our attempts to foster a culture of creativity amongst the staff at the office, and in particular I'm interested in fostering a culture of innovation amongst the programmers. Innovation doesn't just spring out of nowhere – especially if your schedule is full – so we've being trying to give time and space for people to innovate.

As such, we have initiatives like Blank Page Tasks, where we get a small group of developers to go away for a couple of weeks and work on whatever they like. This sort of thing is similar to the one day a week that Google allocates its engineers to work on pet-projects in the hope of uncovering interesting new ideas.

One of the next things we're trying to tackle is having a creative environment to work in. Our studio is in a great location on the seafront in Brighton, but once you get inside it looks too much like an insurance office for our liking. We want to create a space where people are creatively stimulated – and I don't mean just leaving a few Nerf guns lying around the place.

> *"Our studio, once you get inside it, looks too much like an insurance office for our liking. We want to create a place where people are creatively stimulated..."*

The Imagineers work area was a large, highly personalised space, where their motto is 'Nothing Is Nailed Down'. They could quickly reconfigure their area as their work groups changed so that people working on the same project could sit next to each other. They were also very proud of their past and current work, which adorned every spare inch of wall.

In an attempt to spruce up our offices, and taking inspiration from the Imagineers, each of the feature teams has been given a budget to customise their area, and they've been coming up with ideas for how to spend it. One of the teams is hooking up some Grand Prix start lights above their area and another wants to hook up some multi-player *Daytona* cabinets.

The vehicle team wanted to build a motorised cabinet like *Space Harrier*. In addition to buying an electric wheelchair from eBay, they've been down to the breakers yard and come back with various bits of a Ford Mondeo. The chair, cannibalised for its electric motor, orients the steel frame depending on input from our game, while the Mondeo's dashboard has been rewired to form the HUD.

Pixar believes that you can tell if the staff had fun making its films – I wonder if the same is true for games.

www.blackrockstudio.com

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HEARDABOUT

Battlefield Bad Company

DICE's David Möllerstedt and Stefan Strandberg talk sound design on a new Battlefield with **John Broomhall**…

FORMATS: PlayStation 3, Xbox 360
DEVELOPER: EA DICE
PUBLISHER: Electronic Arts

THE AUDIO TEAM:
David Möllerstedt *(head of audio)*, Stefan Strandberg *(audio director)*, Bence Pajor *(sound design)*, Olof Strömqvist *(voice-over producer)* Tobias Falk *(cut scene director)*, Mikael Karlsson *(composer)*, Please MusicWorks *(composers)*, Jonatan Blomster *(audio programmer)*, Anders Clerwall *(audio programmer)*, Björn Hedberg *(audio programmer)*, Johan Kotlinski *(audio programmer)*

DICE's head of audio David Möllerstedt (above, left) and audio director Stefan Strandberg (above, right) went to great lengths to make Bad Company's aural experience convincing

Discussion of *Battlefield*'s audio reveals passion, care and enlightened pragmatism which are both refreshing and impressive.

Enjoying a rare opportunity to start from scratch with a brand new game engine, head of audio David Möllerstedt and audio director Stefan Strandberg worked closely with the DICE Tools group to ensure a well-integrated sound functionality.

With multi-player environments allowing up to 24 protagonists to blast each other with a variety of noisy weaponry, cacophony was always a clear and present danger in new game *Bad Company*.

Ensuring a good overall mix was a key focus: "There's a lot going on and it's difficult to know what's going to happen so volume balancing has always been tough. Ducking systems with 'static' rules to cover fairly predictable situations aren't enough – we'd need thousands of those rules," Möllerstedt explains.

"Instead we have a sophisticated run-time system that deploys the available dynamic range intelligently moment by moment, logically selecting and balancing the loudest sounds for each player," says Strandberg. "From a design perspective, it's like a movie mix where important sounds are deliberately prioritised and pre-mixed to fill the dynamic range. You may be in the middle of a car chase but if you fire a gun, it can dominate the engine sound temporarily. Other sounds are made to give way. We constantly measure volume at the listener position and continuously scale sounds."

> ***"There's no generic rock music here…"***

The resulting output is run-time mastered using in-line compression and EQ. Three presets are available with the original mix left untouched for top end speaker systems, gently processed for 'Hi-fi', and for 'TV' heavily compressed with low end bass removed.

The team's approach to perceived volume is worthy of note. Explains Strandberg: "We asked ourselves 'What is a normal listening level?' When you play super-loud on a super-amazing system where you can hear all our discrete LFE content, the sound has become very much a physical experience. For players with smaller speakers at regular volume, audio excitement can be lost – it's good, but not aggressive – a phenomenon compounded by sound designers monitoring at high decibels. Yet curiously, a YouTube video clip can convey a sense of loudness because of clipping and distortion. We want to deliver excitement, hence investing many hours achieving that 'kind-of-destroyed' sound without fatiguing the ear – aggressive-sounding at normal listening levels. This philosophy has infiltrated the whole production process from recording to processing. Much of our content is very high fidelity, but equally we've not been afraid to embrace the ugly!"

Convention has also been broken by discarding pure 3D-positioning for some sounds. For instance, explosions are stereo. "It seems fundamentally wrong to position explosions," says Strandberg. "We're more interested in the sense of what the bang did to the environment – all the reflections building up. These sounds make a huge impression on the world but it's difficult to detect their exact position – the perceived effect is all around you. The upshot is that by contrast, distant 3D-positioned sounds in *Battlefield* are very convincing, helping reinforce scale and depth of field. The flip side is when something's close, a palpable sense of danger prompts the player to react."

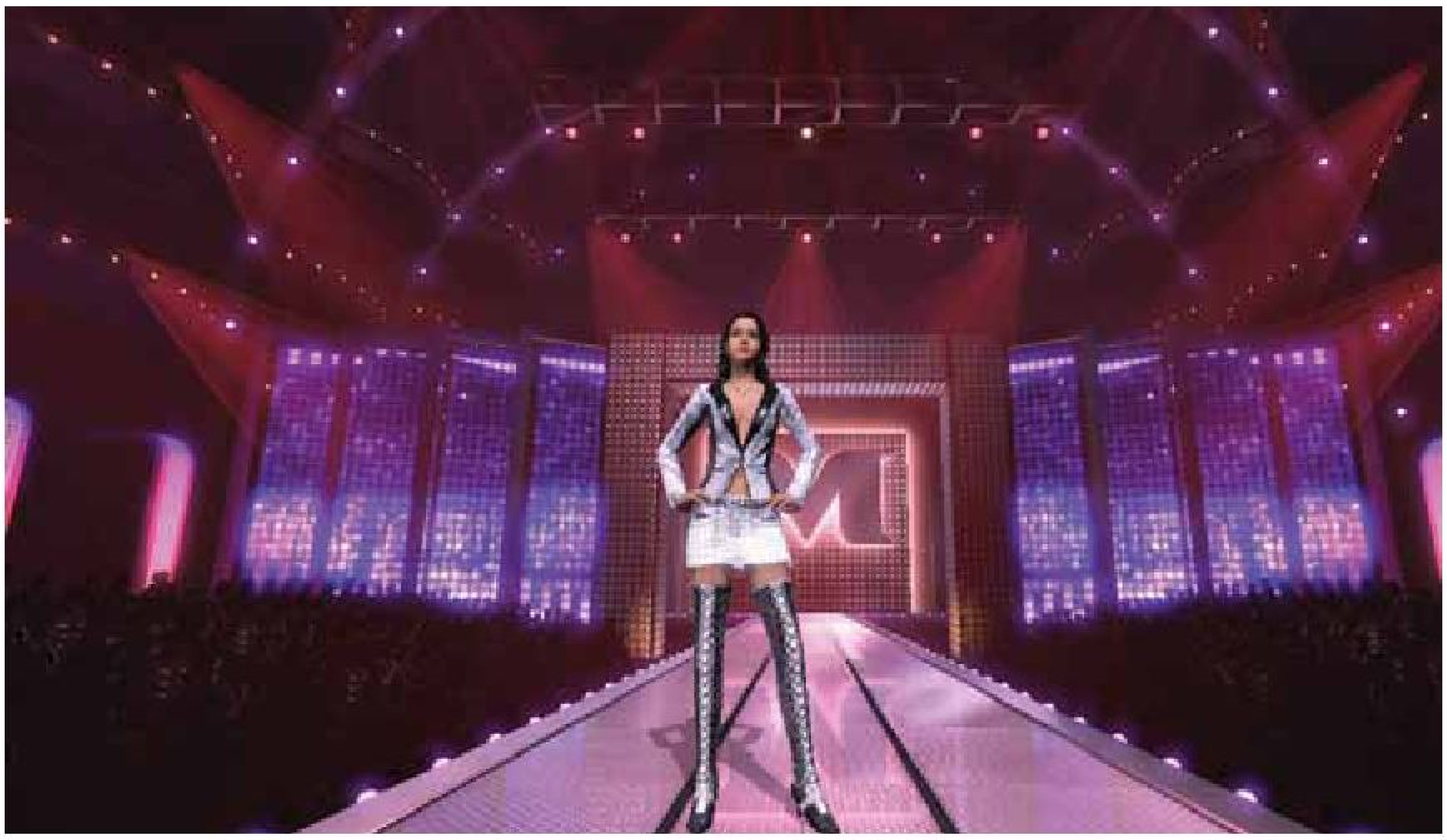
When collecting source sound, the team really got lucky – the Swedish army decided to perform a military exercise running a fake war two weekends in a row in their home town. It was the chance of a lifetime to capture the sounds and reflections of various vehicles and guns in urban streets from a variety of perspectives using their trusty MKH-416.

Musically, the game features a combination of orchestral content to support the narrative story in cut scenes, and a series of contemporary tracks played on vehicle radios. "We don't need adaptive music systems but we do use specific cues to, say, build up to a firefight," says Möllerstedt. "However, when things kick off, we silence the music allowing weapons to dominate – it's so much more dramatic. Four styles have been chosen for the radio – surf music, vintage gospel, steel guitar blues and 'classical', the flavour of which changes depending on the country you're in." No generic rock here.

Strandberg continues: "This approach leads to some really nice creative juxtapositions – the contrast of extremely violent gun sounds as your Humvie is attacked – against a backdrop of vintage gospel or blues is very surreal and very cool! Hearing the game engine create moments like that really makes us smile."

John Broomhall is an independent audio director, consultant and content provider
develop@johnbroomhall.co.uk
www.johnbroomhall.co.uk

Nurien takes the virtual dance floor by storm with Unreal Engine 3



Nurien Software is creating a stunning virtual world that shows off the versatility of Unreal Engine 3. Nurien's 3D social networking universe demonstrates the engine's versatility outside of traditional console action games. It includes *MStar*, a rhythm dance game; *Runway*, an innovative fashion show application; *QuizStar*, a casual online trivia game; and much more.

Users can personalise 3D avatars that interact and play games with each other online on Nurien's platform. Games and applications are built into the software client, which utilises an avatar system complete with content creation tools to offer unrivaled customisation features.

Over 3,000 materials and textures enable users to invent a range of clothing and accessories for the avatars. Virtual designers can incorporate materials such as leather, jeans and velvet onto a single item and even apply decals to create truly unique, wearable pieces of art.

Characters in the avatar system move realistically due to the assignment of unique physics values to body parts, hair and accessories. Each component moves independently within the avatar environment, enabling characters to simulate realistic physical movements and take on life-like personas.

NEW UE3 FEATURES SHOWCASED DURING MICROSOFT'S GDC KEYNOTE

Epic CEO Tim Sweeney revealed several exciting new Unreal Engine 3 features to illustrate this during Microsoft's GDC keynote.

A meat cube demonstrated soft body physics, while hundreds of *Gears of War* Locust characters ran down a wide city street to show off our new flocking technology. New structural analysis and fracturing tools were evidenced by firing weapons at stone walls and columns to reveal underlying structure and rooms below.

We also presented new rendering features, including vastly improved character lighting and screen space ambient occlusion, which renders an approximation of global illumination for more realistic environment shadows.

SCALEFORM GFX INTEGRATION WITH UNREAL ENGINE 3 AVAILABLE NOW

Scaleform GFx, the best-selling user interface production tool for hardware-accelerated scalable vector graphics, has been integrated with UE3.

Through its membership of Epic's exclusive Integrated Partners Program, Scaleform has developed a production-ready GFx integration that is now available to all developers and publishers using UE3.

Scaleform GFx is fully integrated into the UE3 hardware-independent graphical rendering system for superior cross-platform support, enabling artists to create scalable, data-driven UI elements for menuing systems, overlays, HUDs and animated textures directly on 3D objects.

MORE KOREAN DEVELOPERS LICENCE UNREAL ENGINE 3

Devroot Studio, a division of Sonov Corporation, has licensed UE3 to develop its unannounced title, codenamed *BK Project*. Devroot Studio is a dedicated online game development team within Sonov, the publisher of *Shaiya: Light and Darkness*, a wildly successful MMORPG.

"Over the past six months, we have researched lots of game engines for our next project," said Jeon Min-Uk, product director of Devroot Studio and chief technical officer of Sonov. "And now, we proudly announce that Unreal Engine 3 is the most flexible and capable engine, and we believe it will enable us to fully harness our creativity."

Seoul-based developer Dragonfly also recently licensed UE3 for an unannounced project. Dragonfly developed *Special Force*, the top ranked game in Korea's Internet cafes with over 11 million registered users, a professional league with 36 teams and the largest cash prizes for online gaming in Korea.

"Unreal Engine 3 is the right game engine for us," said Park Cheol Seung, vice president of Dragonfly. "While we have developed much of our own technology over the years, UE3 clearly provides the cutting-edge framework we need to ensure the highest standards in our project."

UPCOMING EPIC ATTENDED EVENTS:

E3 2008
Los Angeles, CA
July 15-17, 2008

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To discuss anything raised in this column or general licensing opportunities for Epic Games' Unreal Engine, contact:
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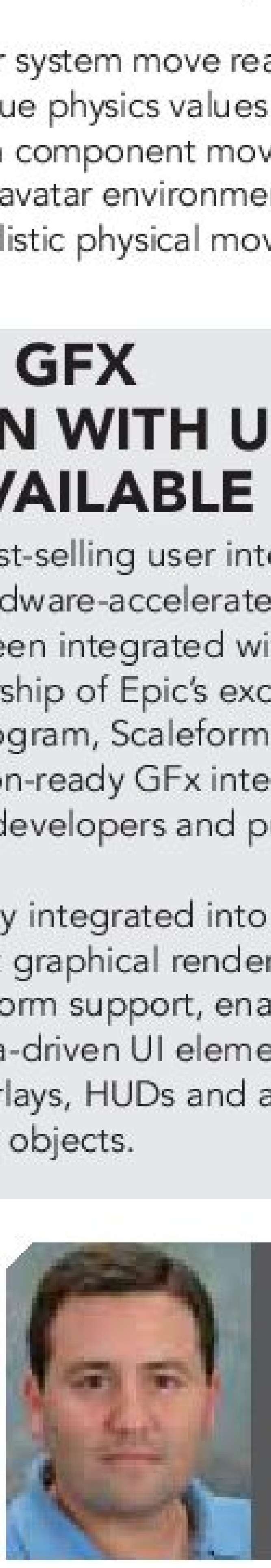

***Mark Rein** is vice president of Epic Games based in Raleigh, North Carolina. Since 1992 Mark has worked on Epic's licensing and publishing deals, business development, public relations, academic relations, marketing and business operations.*

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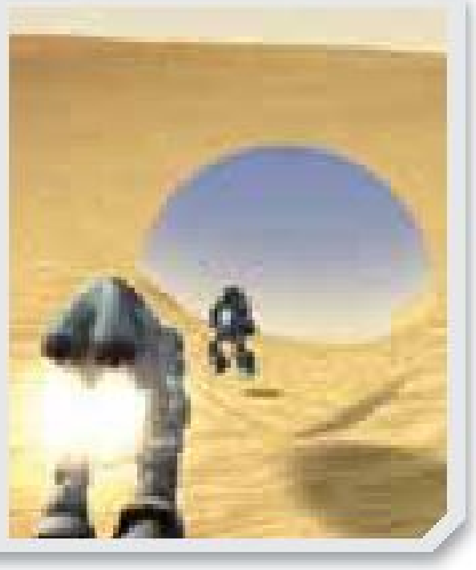

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p68

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p72

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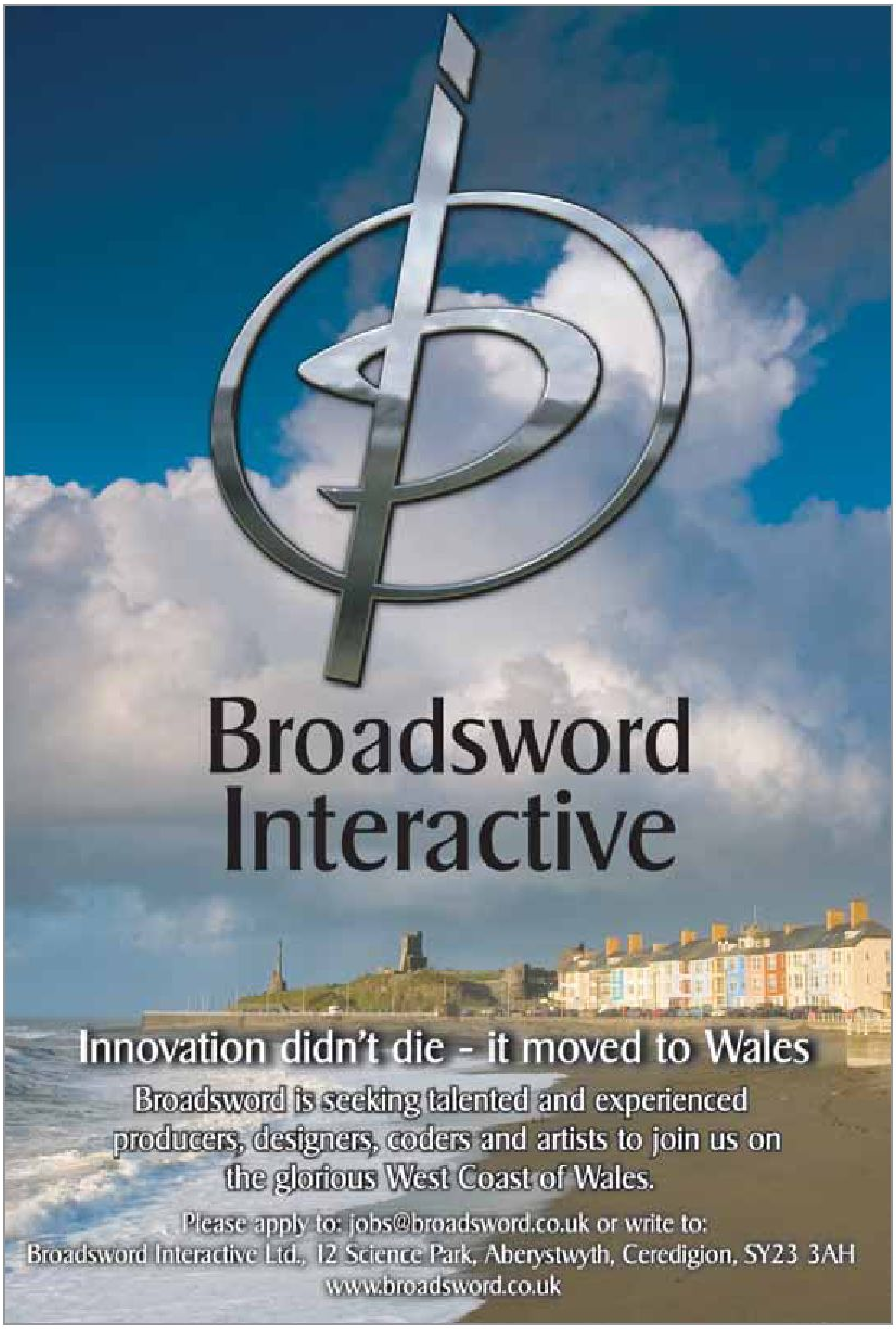

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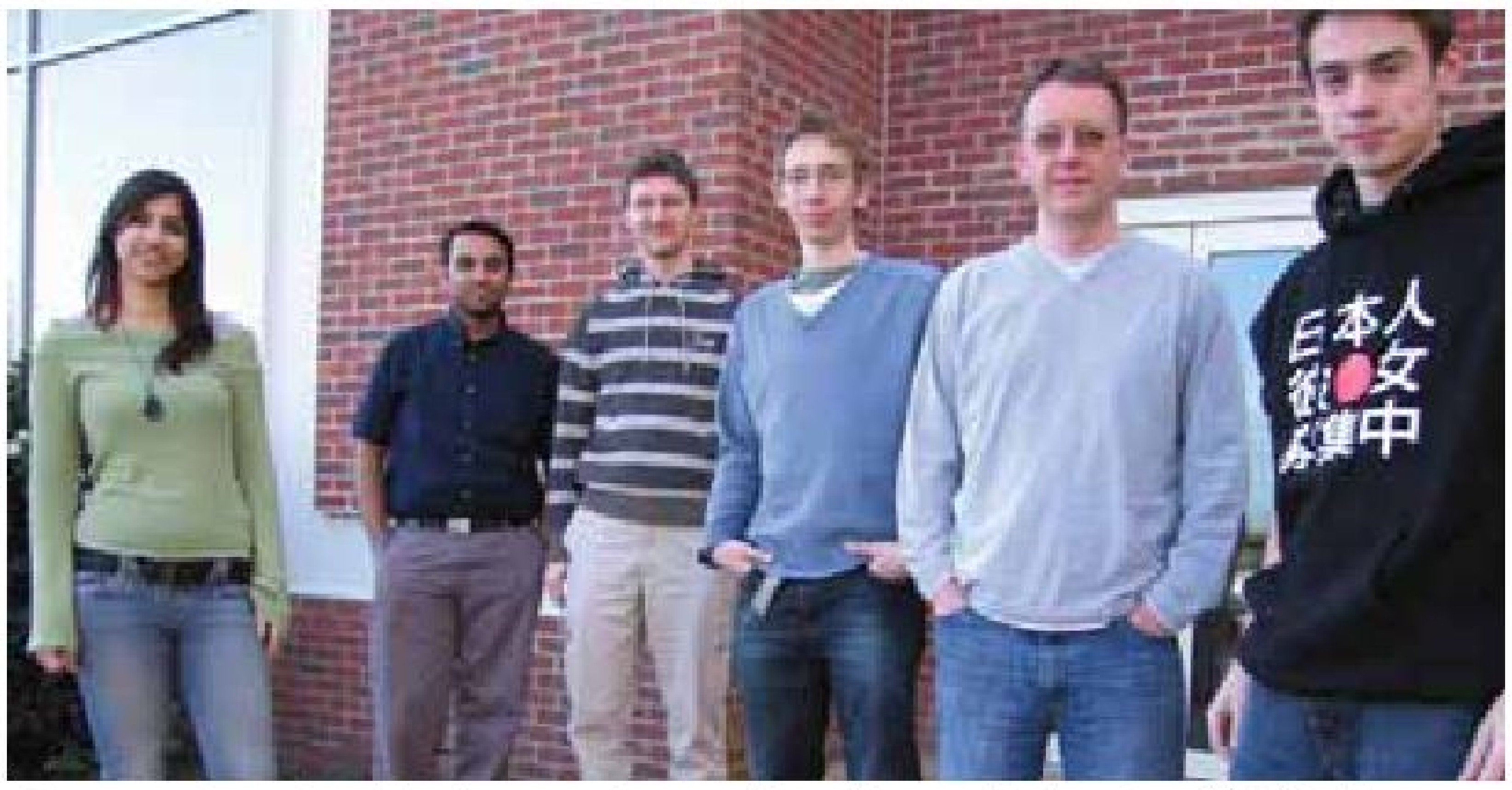
Studio News

Games development's movers and shakers. This month: Gusto grows and Distinctive diversifies



Gusto continues its relentless recruitment drive, this month showing off six fresh new members of the team.

First up is Anna Stylianidou (*far left*), who joins the company as a junior animator fresh from Bournemouth University where she gained an MA in 3D Computer Animation and a BA in Film and Animation. Deepak Mariyappa (*second from left*) joins the industry after spending eight years as a programmer outside of the games sphere.

Also joining the team is Lubomir Baran (*third from left*), previously an art team leader at Slovakian outsource company Cauldron working on titles such as *Auto Assault*, *Civil War* and *Soldier of Fortune - Payback*, and graduate Steven Davies (*third from right*) who joins fresh from a BA in Computer Games Design and an MA in Computer Animation at Teeside University.

Taking the role of senior designer is Mark Mainey (*second from right*), who has worked at Sega Racing Studio and Reflections before that on games including *Driver: Parallel Lines*, *Stuntman 2* and *Sega Rally*. Finally, Luke Maskell (*far right*) joins as a junior artist fresh from Staffordshire University with a BSc in Computer Games Design.

"This month has been an extremely fruitful one on the recruitment front with six new staff joining our Banbury studio," said Steve Archer, Gusto Games' development director.

"We have managed to find a good mixture of exceptional emerging and experienced talent that will take the company forward as we go into full production with our first PlayStation 3 title. The coming months will see us recruit heavily at both our Banbury and Derby studios."

www.gustogames.com

Distinctive Developments has added Johanna Vuorela as the firm's new operations manager.

Before joining Distinctive, Johanna was head of post production at mobile publisher Hands On, and created and lead iFone's post-production department. Her role at Distinctive will be to oversee the company's global post-production services as part of the mobile game developer's increased focus on porting existing titles in addition to creating its own.

Nigel Little, Distinctive's managing director, said: "Post production is a critical component in mobile development. The sheer number of handsets on the market and the need to ensure that every consumer has the best possible experience makes it vital that all of our porting and QA services are of the highest quality. Johanna has the experience and understanding to ensure that we provide the best possible standard of service to all of our clients and guarantee that all of our games meet expectations."

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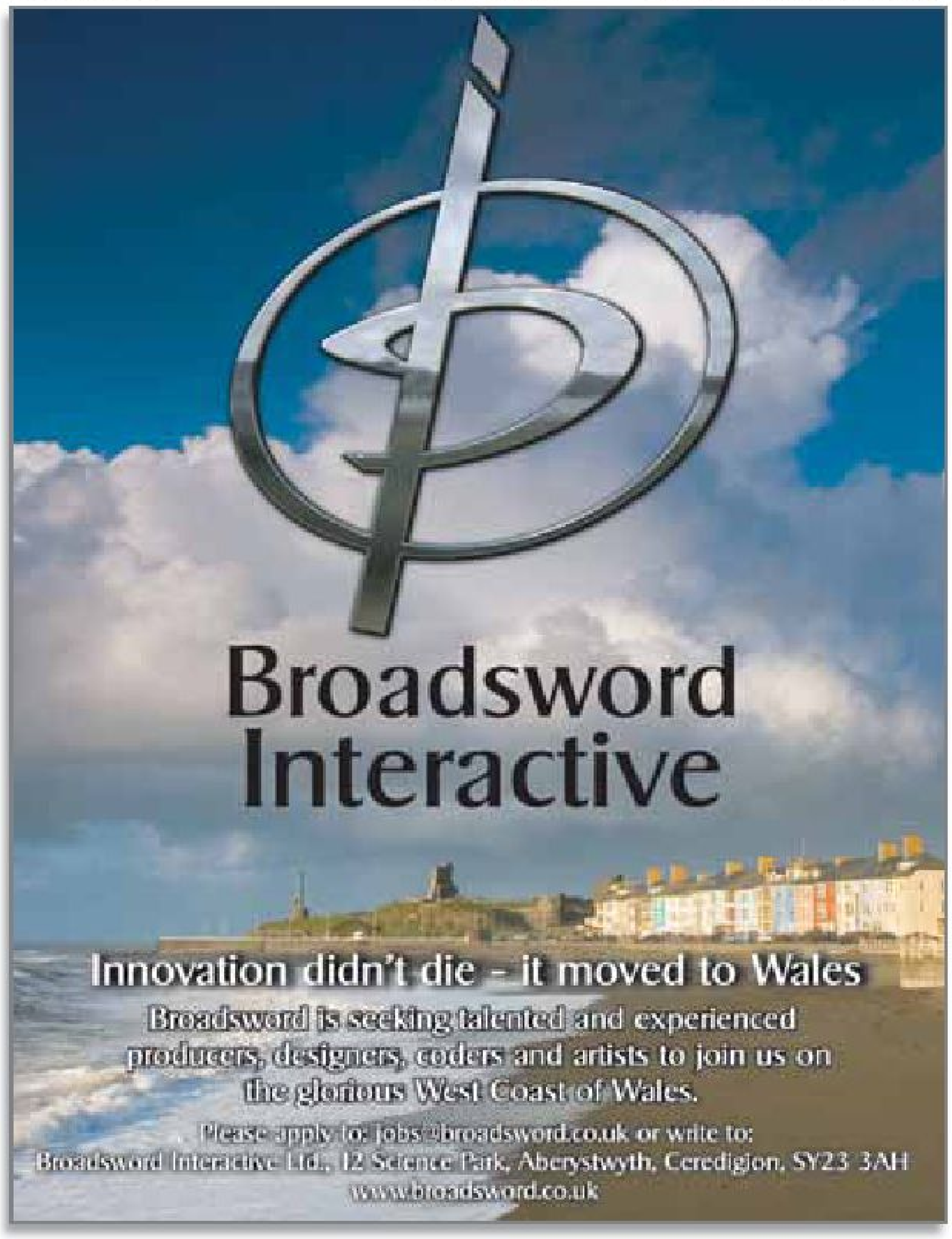

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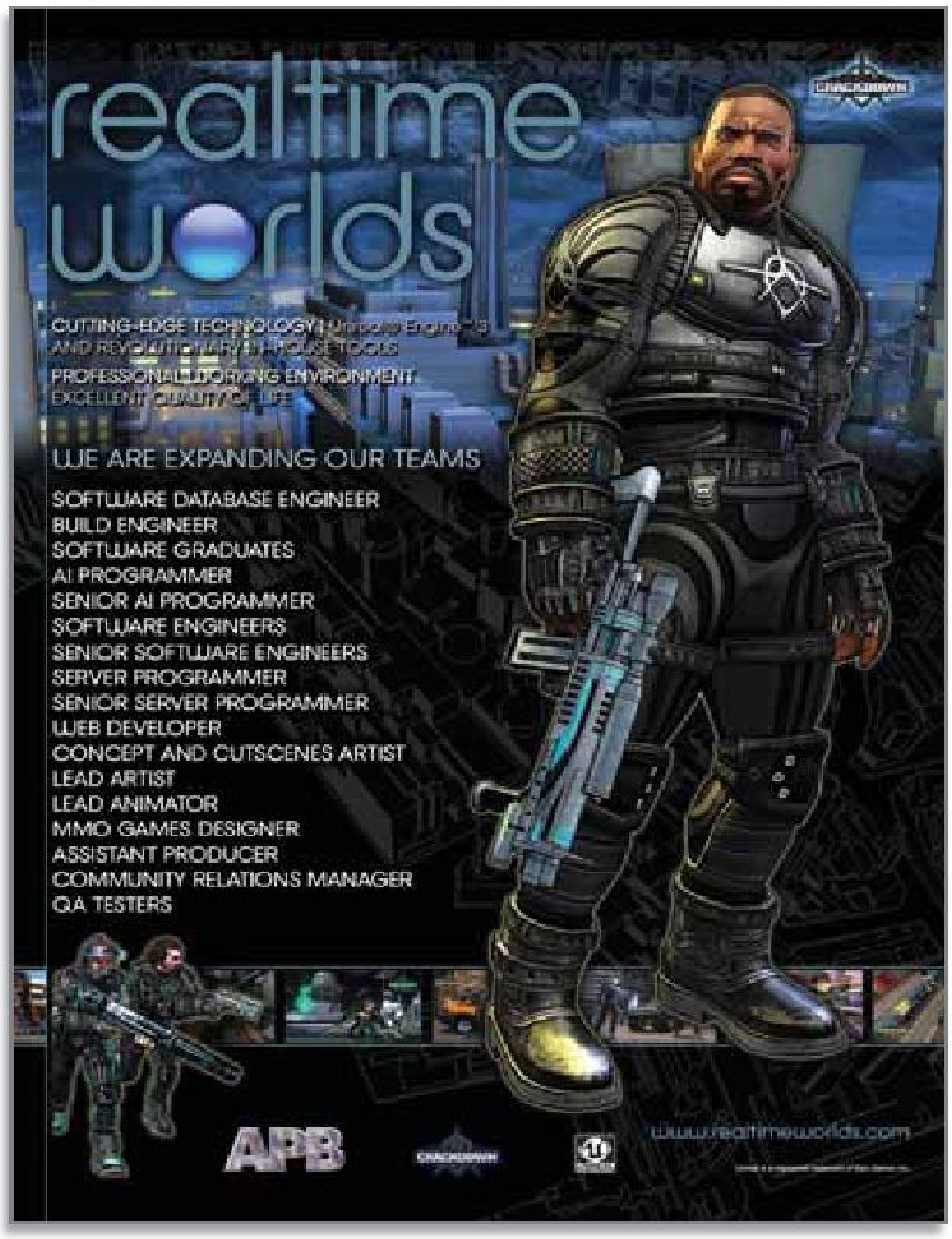

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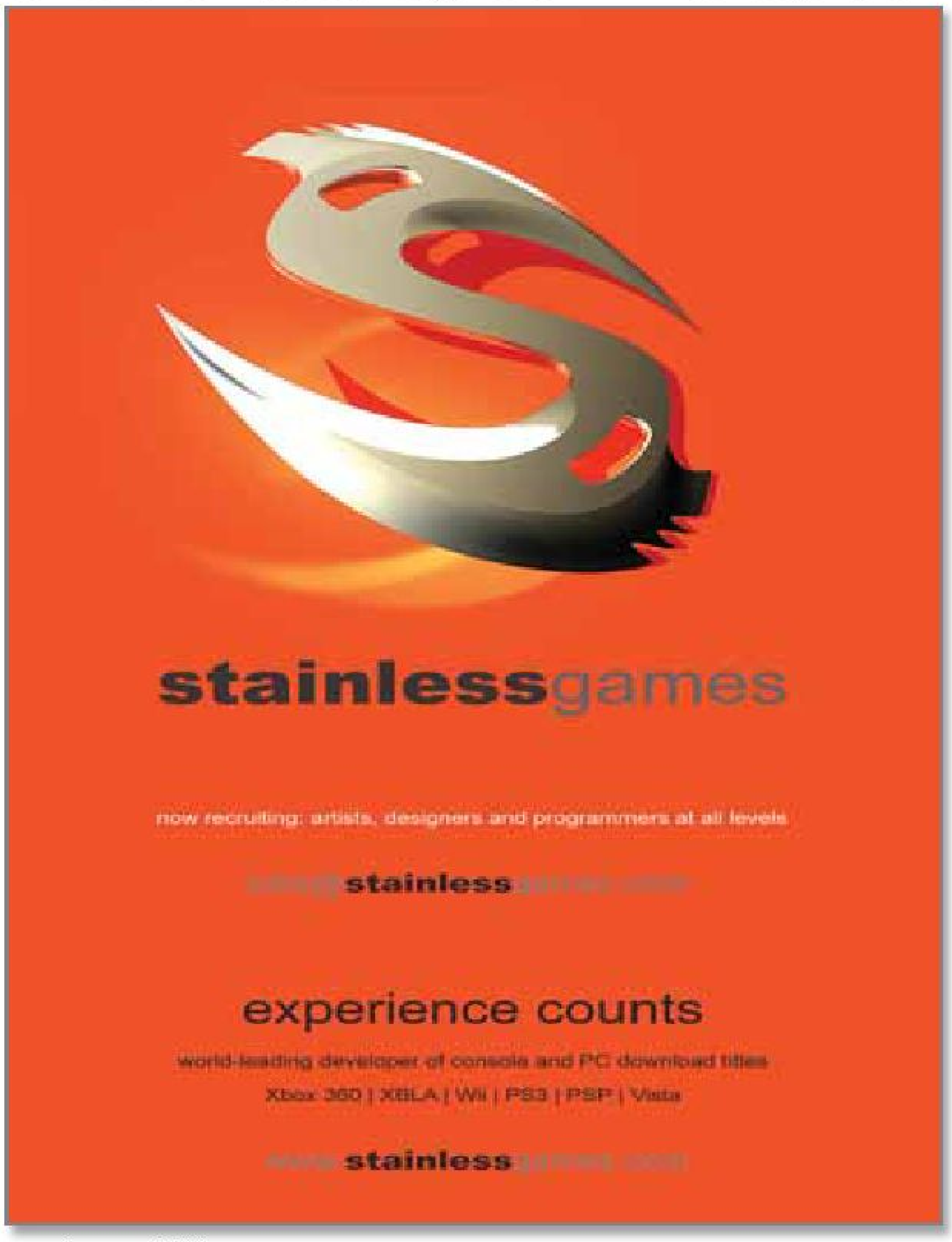

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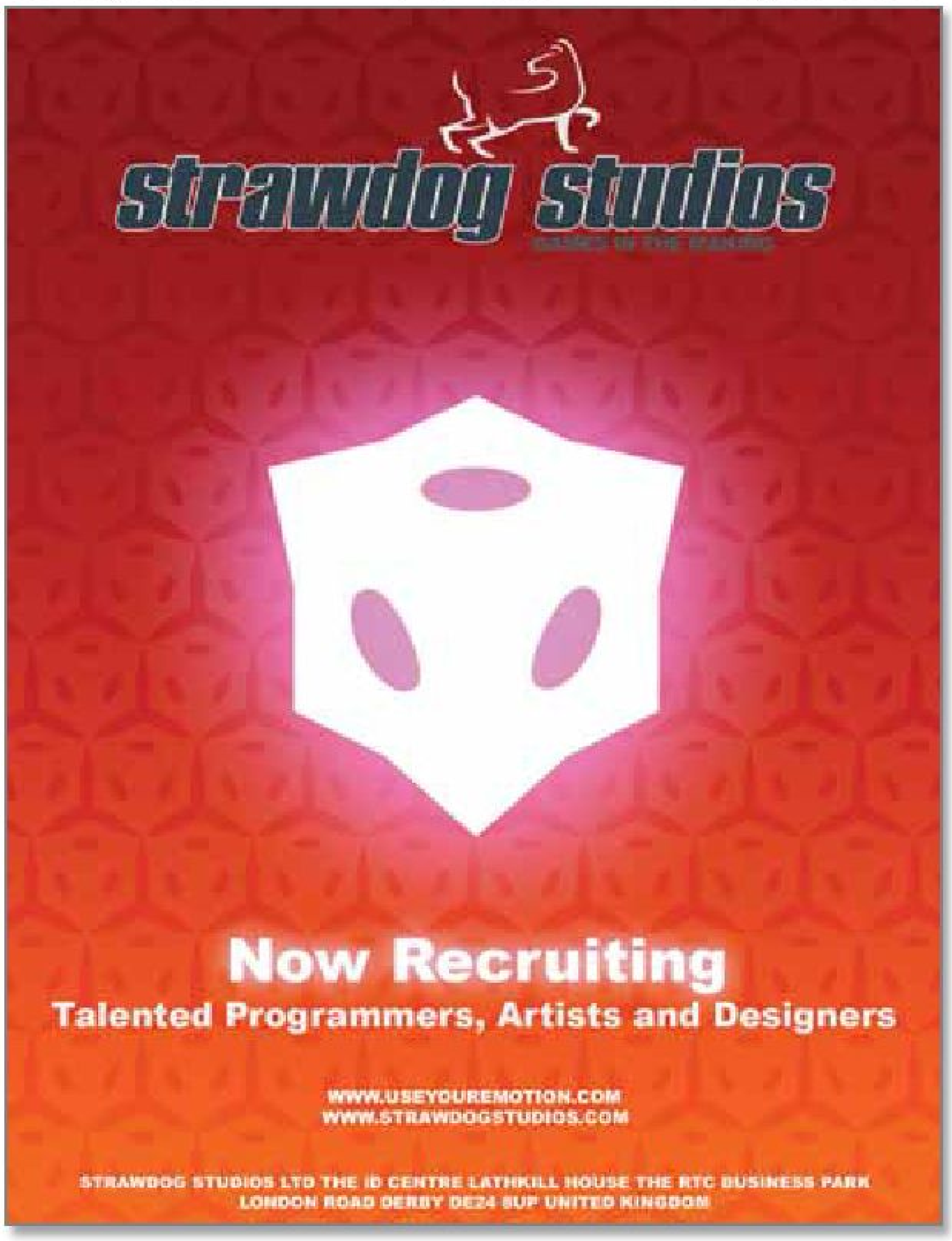

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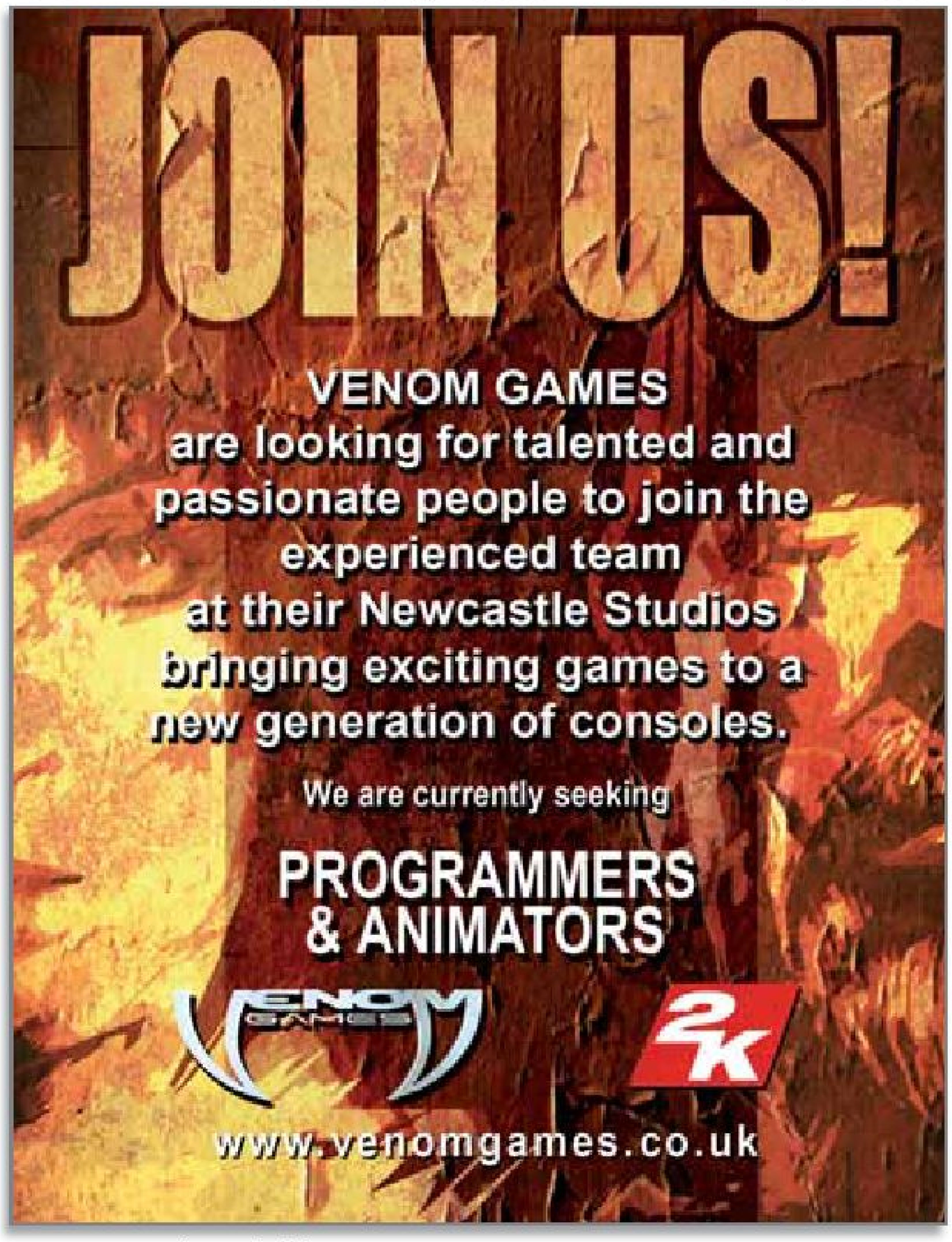
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Tools News

NaturalMotion Expands Leadership Team

Oxford-based middleware developer NaturalMotion has appointed Leighton Webb as its vice president of business development for games. Webb's career in the games industry has spanned countless companies, his roles including worldwide product manager at Ubisoft, general manager of AOL games, executive director of Vivendi Universal, vice president of mobile at 20th Century Fox and most recently senior vice president of global content strategy and licensing for I-Play.

"The games industry has consistently been an amazing place to work due to the extraordinary amount of innovation that goes on within it. NaturalMotion is one of the companies leading the charge right now, and I can't think of a more exciting place I'd rather work," said Webb.

Torsten Reil, CEO of NauralMotion added: "NaturalMotion tries to attract the best and brightest because we're dedicated to advancing the technology that drives this industry. Leighton brings a wealth of professional experience and we're delighted he's decided to join the team."

www.naturalmotion.co.uk

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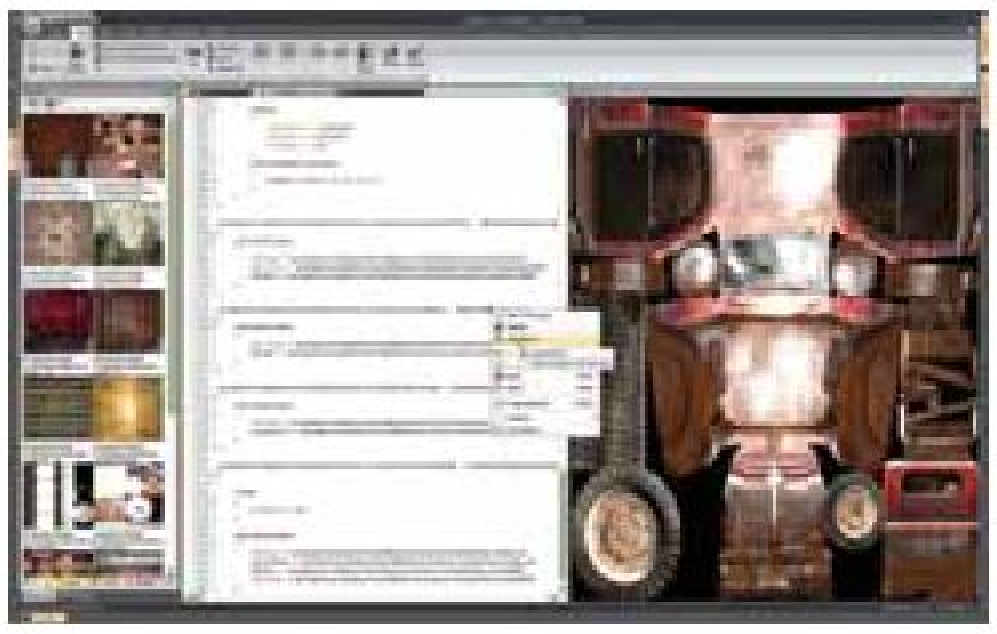


Irish middleware developer Instinct Technologies has released the latest version of its cross-platform game engine, Instinct Studio.

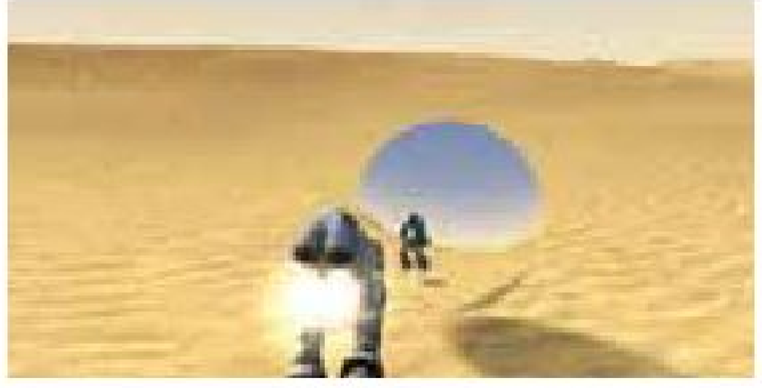
Chief focus for this major point release has been on ensuring performance is equal on all of the engine's target platforms, and features an entirely new graphics rendering system. It also boasts Remote Control, which allows editing to be done in real-time across platforms.

"Whereas the earlier versions of Instinct Studio delivered primarily on the user experience, which we've now enhanced, the main focus this time has been optimizing the various systems across all our target platforms," said Instinct Technology's CTO Dermot Gallagher.

"This is a very significant revision and has been driven by listening to our clients and responding to technical developments in the market place."

www.instinct-tech.com

TORQUE X GOES 3D



GarageGames has launched version 2.0 of its XNA-based Torque X game engine.

Chief new feature of the new version is support for XNA Game Studio 2.0, giving users full access to all of the new upgrades that have been part of the latest version of Microsoft's managed framework released in late 2007, such as improved parity between Windows and Xbox 360 projects, support for the full range of Visual Studio 2005 versions, multiple render targets, faster rendering and the new smoother deployment process.

It also proves a full, stable release of the new 3D features of the engine – which have been present but in a 'beta' state since version 1.5 – including support for GarageGames' proprietary model format DTS, used by its other engines, and the more common FBX, X and XSI model formats.

Currently the only editor available for the application is an updated version of the old 2D drag-and-drop Torque X Builder, although the company has announced that it is currently developing a 3D world editor for the engine, and hopes to release it soon.

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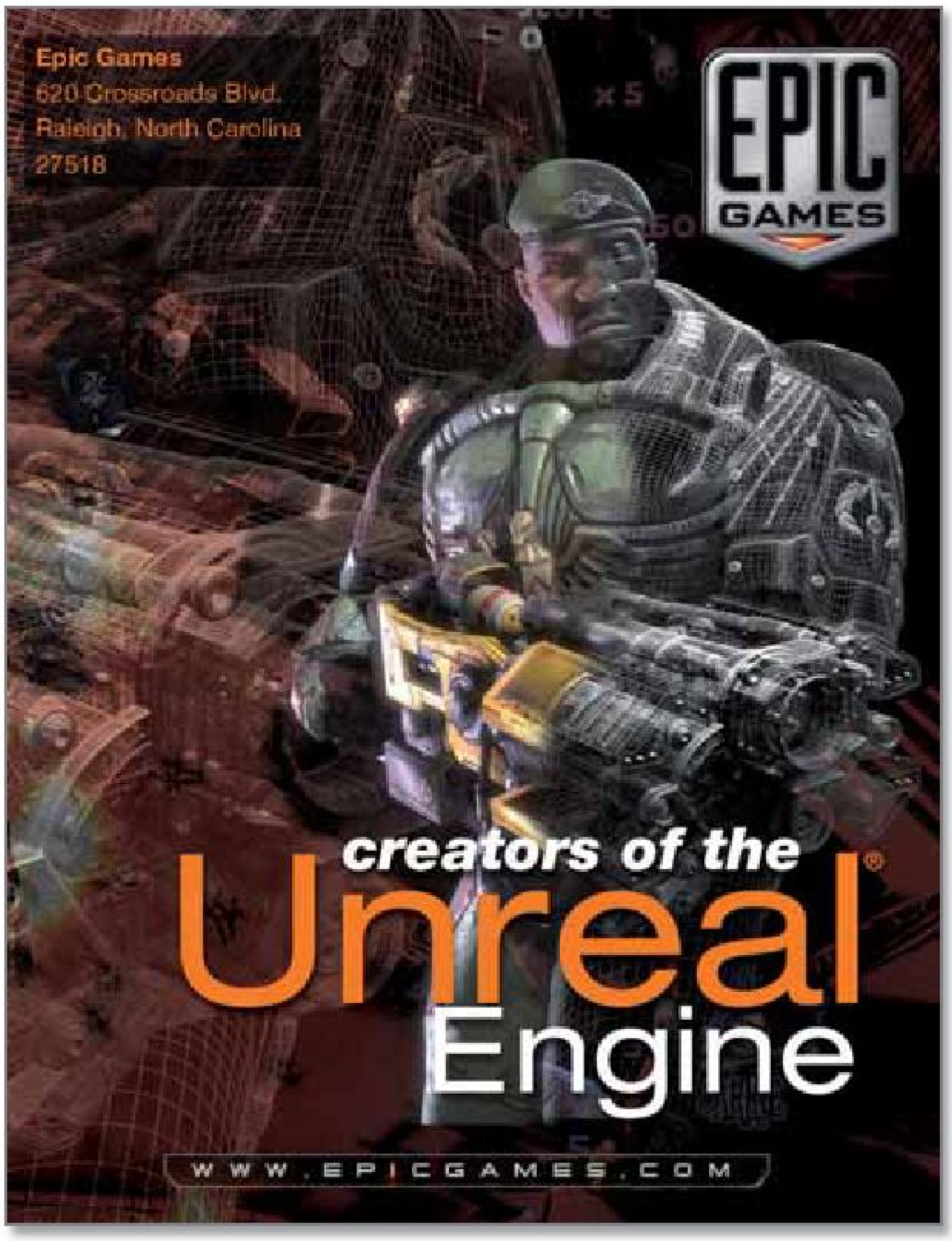

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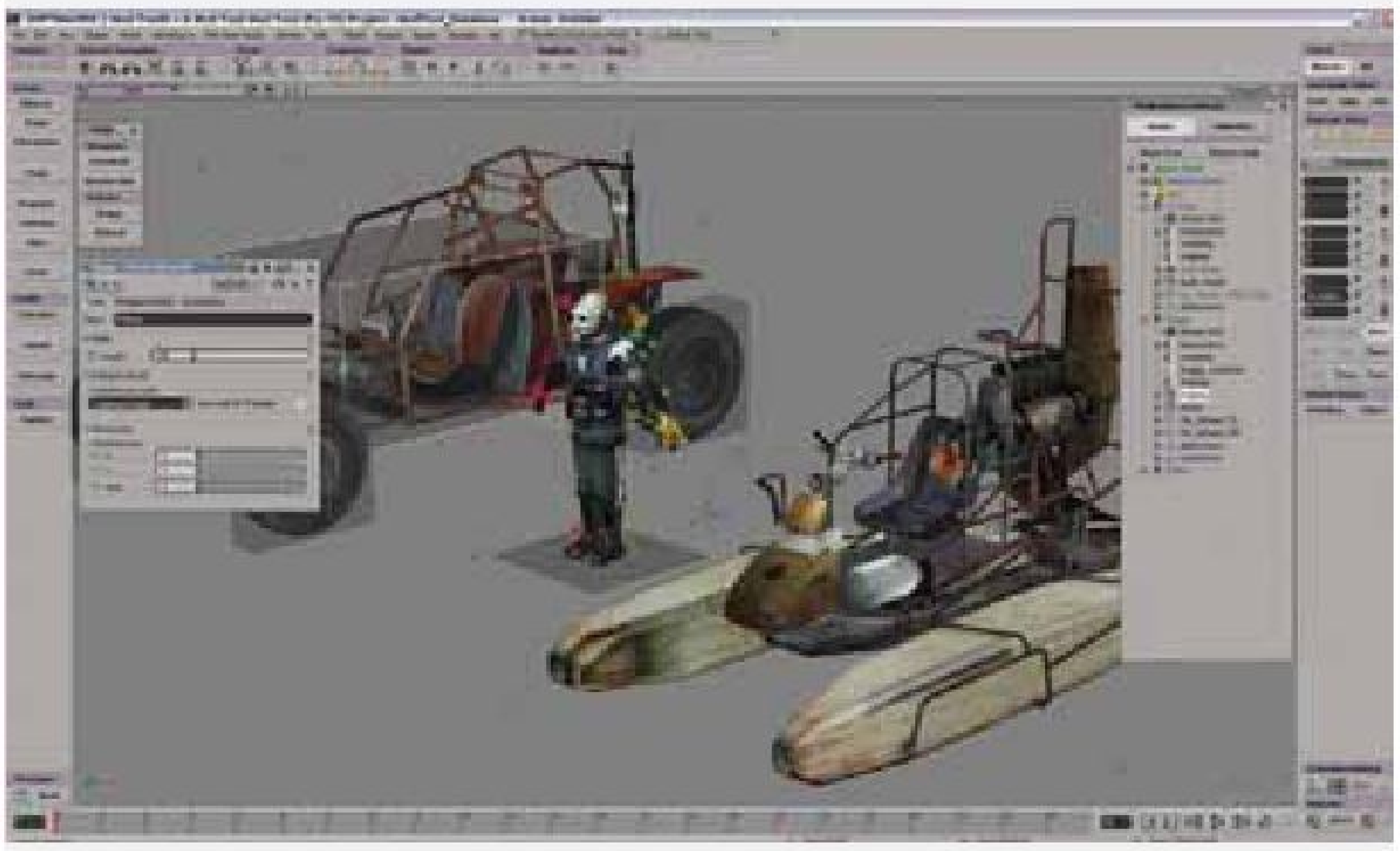
Tool Spotlight

XSI MOD TOOL



RECENT TITLES:
HALF LIFE 2, CRYSIS

SOFTIMAGE|XSI MOD TOOL

Ten years ago, when the game modding community first started to bloom, it didn't matter so much that these hobbyists didn't have access to the same cutting-edge tools that the developers did. While there were still many hankering after the latest Max release, the level of detail required for game models in those days meant that it was an area of opportunity for small shareware developers to make entry-level modelling packages such as Milkshape 3D or Wings that could, with the right application of skill, churn out assets as impressive as their big budget counterparts.

As times have changed, though, and the sheer amount of effort and technological wizardry required to create contemporary assets has risen dramatically, it's become an area that these smaller developers just can't compete in – and similarly, the spread of broadband and the usage of peer-to-peer technologies has made the effort required to illegally obtain the latest Maya edition relatively easy.

As such, while it may have seemed pre-emptive that Autodesk and (then) Alias readied versions of Max and Maya for non-commerical use several years ago, it's only now that we can see the gap in the market these solutions are aimed to fill.

And so we come to Softimage's XSI Mod Tool, which not only integrates with *Half Life 2*, still going strong thanks to Valve's continual Source engine improvements, but also blisteringly next-gen titles like *Crysis*.

It features the same subdivision surface modelling and polygon reduction engines as its more fully-featured brethren; an interactive texture editor for UV unwrapping; the Ultimapper, which can generate normal, ambient occlusion, difference, light and albedo maps within a few mouse clicks; and support for not only the dotXSI file format but also open, cross-product formats such as FBX and COLLADA.

Also included in the Mod Tool download is the Geographic Elevation Mixer, an interactive layer-based fractal generator that can generate terrains based on most elevation dataset formats.

Of particular note is the Mod Tool's support of Microsoft's XNA, extending the Mod Tool's use to new games as well as existing titles. Independent, hobbyist and student developers can use the Mod Tool to generate geometry for their own game titles, which integrates tightly into the XNA Content Pipeline through a custom content processor – allowing artists to practice creating real content with the same interface as the higher-end XSI products.

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Services News

Testronic Labs to offer MMO load testing solution

Testronic Labs has acquired the rights to sell the Venus Blue MMO testing tool in North America, Europe and Japan.

The tool allows large-scale load testing of massively multiplayer online games through simulating virtual users, enabling a thorough performance test in less time and with far less organisation than an open beta.

"Historically MMOs have proved one of the most challenging areas in which to deliver world-class quality assurance," said Neil Goodall, CEO for Testronic Labs.

"The number of users and the requirement to accurately measure performance under load has made this a complex area for games developers. Venus Blue offers the most intensive and thorough testing service available for online games, but also provides major cost savings as very little human participation is required.

He continued: "Server software can be analyzed under real life conditions with large numbers of emulated players, and then tuned to ensure a robust playing environment on product release. We are delighted to have signed this agreement which reflects our strategy to become market leaders in the provision of MMO testing worldwide."

Venus Blue was developed by Korean non-profit company ETRI, whose senior research engineer Jesse Kim added: "With their established track record for providing games, network and software testing expertise to leading games publishers, Testronic Labs is ideally positioned to operate as our Venus Blue distributor and service provider."

www.testroniclabs.com

ORGANIC MOTION EXPANDS TO UK

Organic Motion has opened its first European markerless motion capture facility in London, called Studio 7.

The company's STAGE technology is claimed to capture real-time data without the need for markers or full-body suits, and can stream clean data directly into Autodesk MotionBuilder.

"We now offer the most technologically advanced and comprehensive markerless service in the entertainment industry," said Andrew Tschesnok, CEO of Organic Motion.

"We know that its ease of use and improvements in quality will not only impact the gaming industry, but will also shape live-action and 3D animations for cinema, television and Internet productions to come."

Studio 7's managing director Chris Richmond added: "Studio 7 is all about providing the latest production technologies in both the film and animation realms, to the fast growing UK and European markets. We are proud to be associated with the leading edge 3D animation technologies provided by Organic Motion."

www.organicmotion.com

TWELVEJ GROWS

Game development industry-specialised training programme provider TwelveJ has appointed Claire Anderson as a senior consultant at the company.

Prior to joining TwelveJ, Anderson was manager of art and animation recruitment at Datascope, and previous to that worked in human resources at the BBC on HR policies and staff development.

The company continues to offer training programmes aimed at game development studios, and has created bespoke courses for staff at Sony Computer Entertainment Europe and Media Molecule. Recently it hosted an open workshop, 'Acting for Animators', where host Ed Hooks described the 'seven essential acting principles' and how to achieve them in animation.

"I'm delighted to have Claire join us as we roll out more training programmes and compile an innovative programme of workshops designed exclusively for development studios," said Kumar Jacob, founder and managing director of TwelveJ.

Anderson herself added: "I've known Kumar for some time and am thrilled to join the company at such at exciting time for TwelveJ and the industry as a whole."

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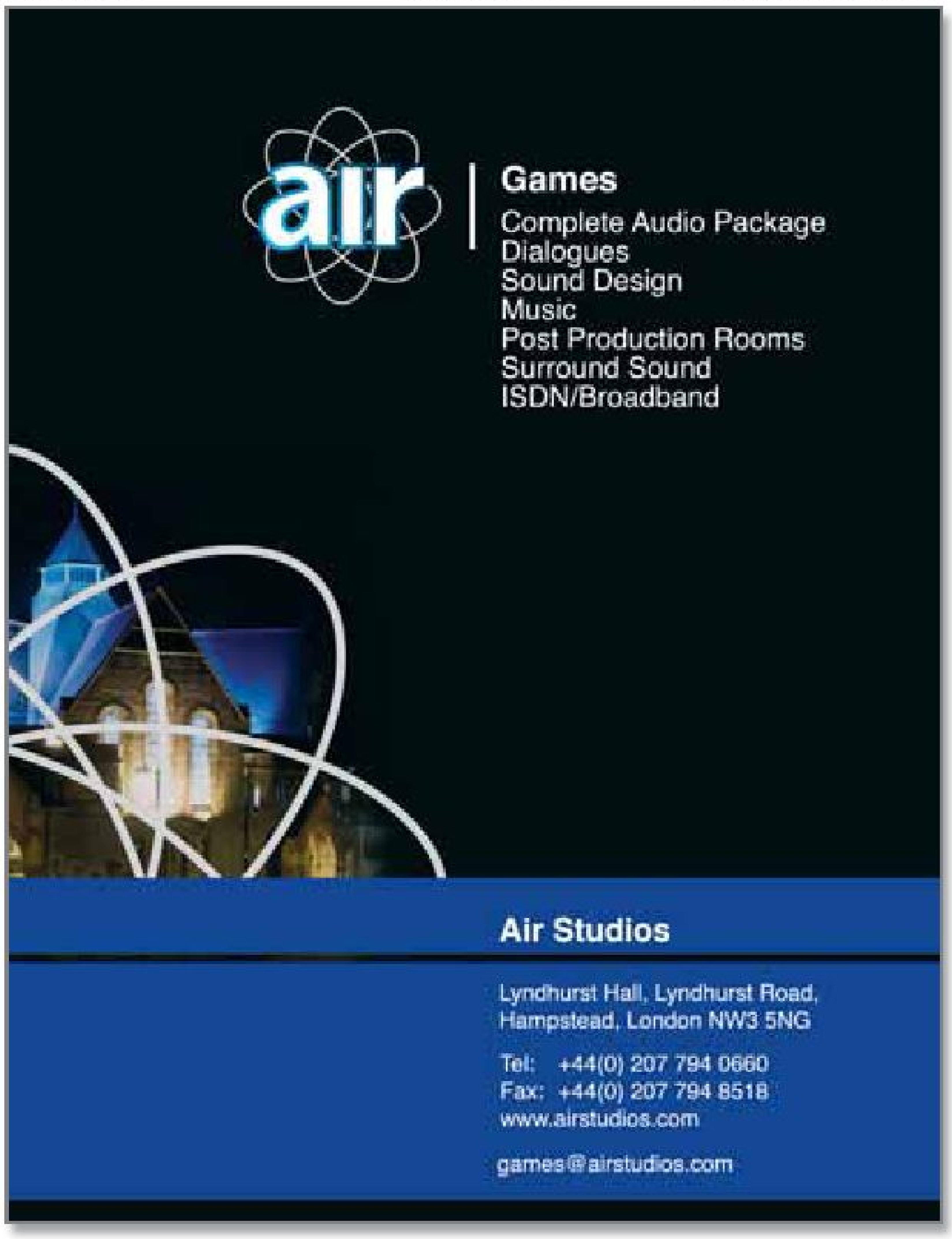

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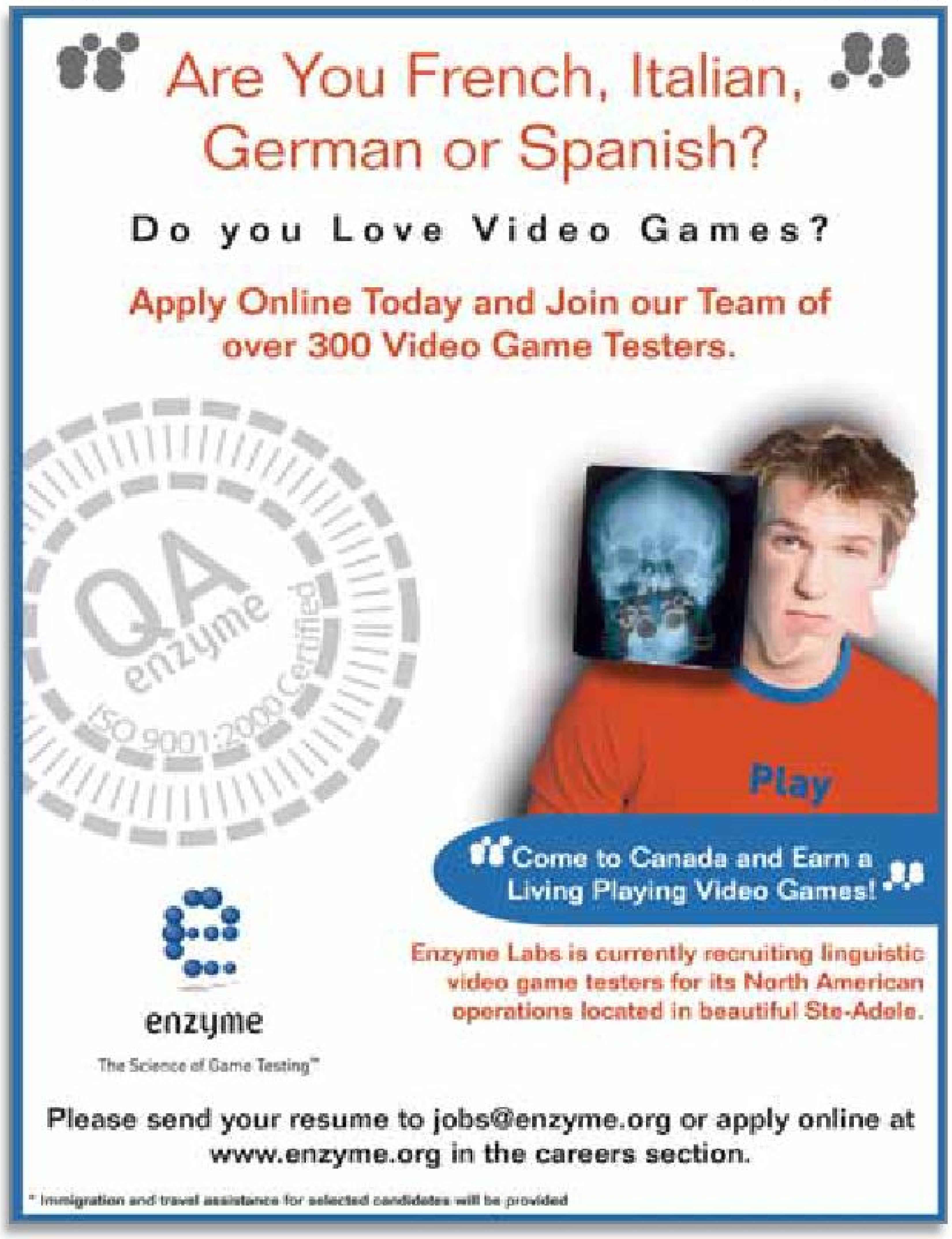

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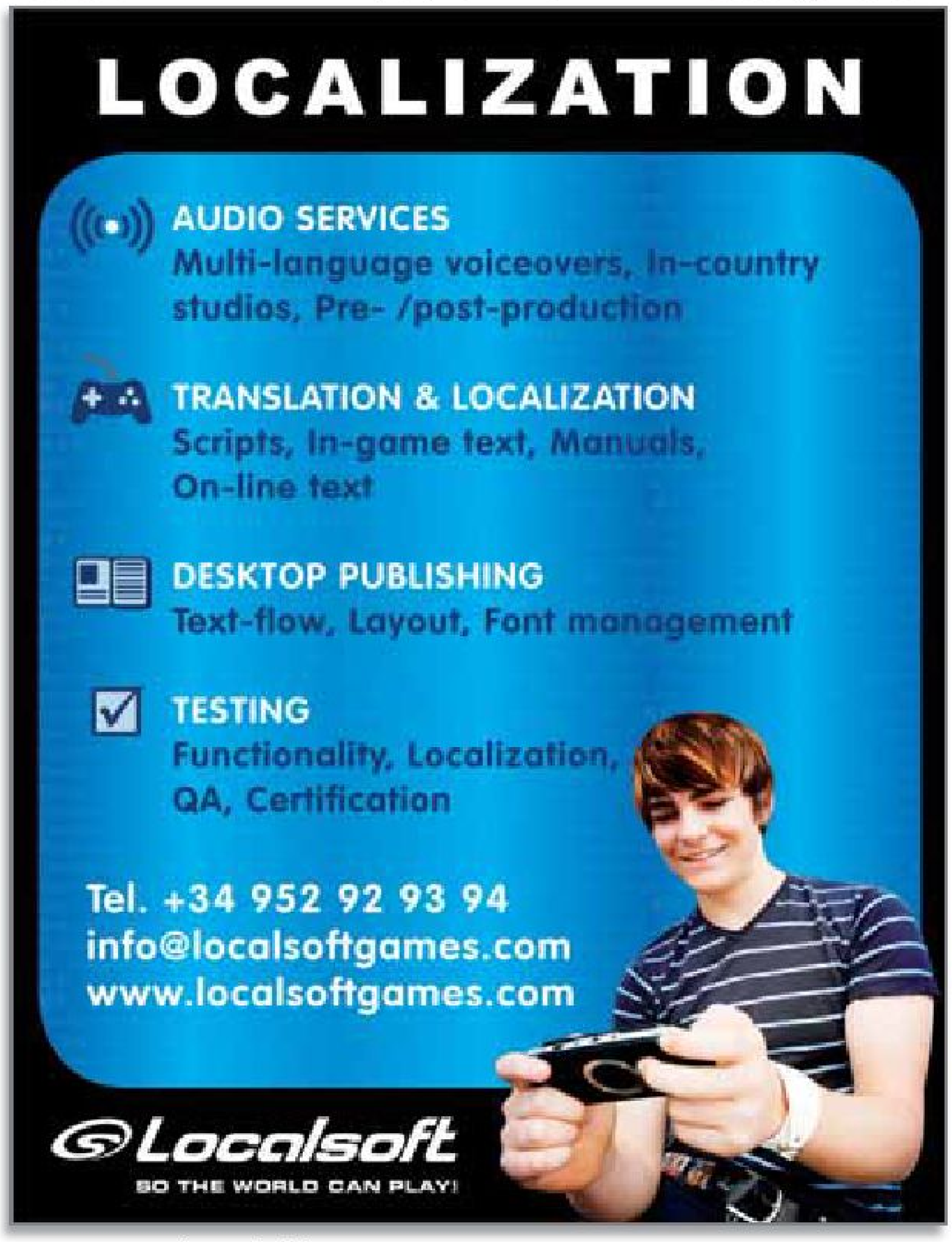

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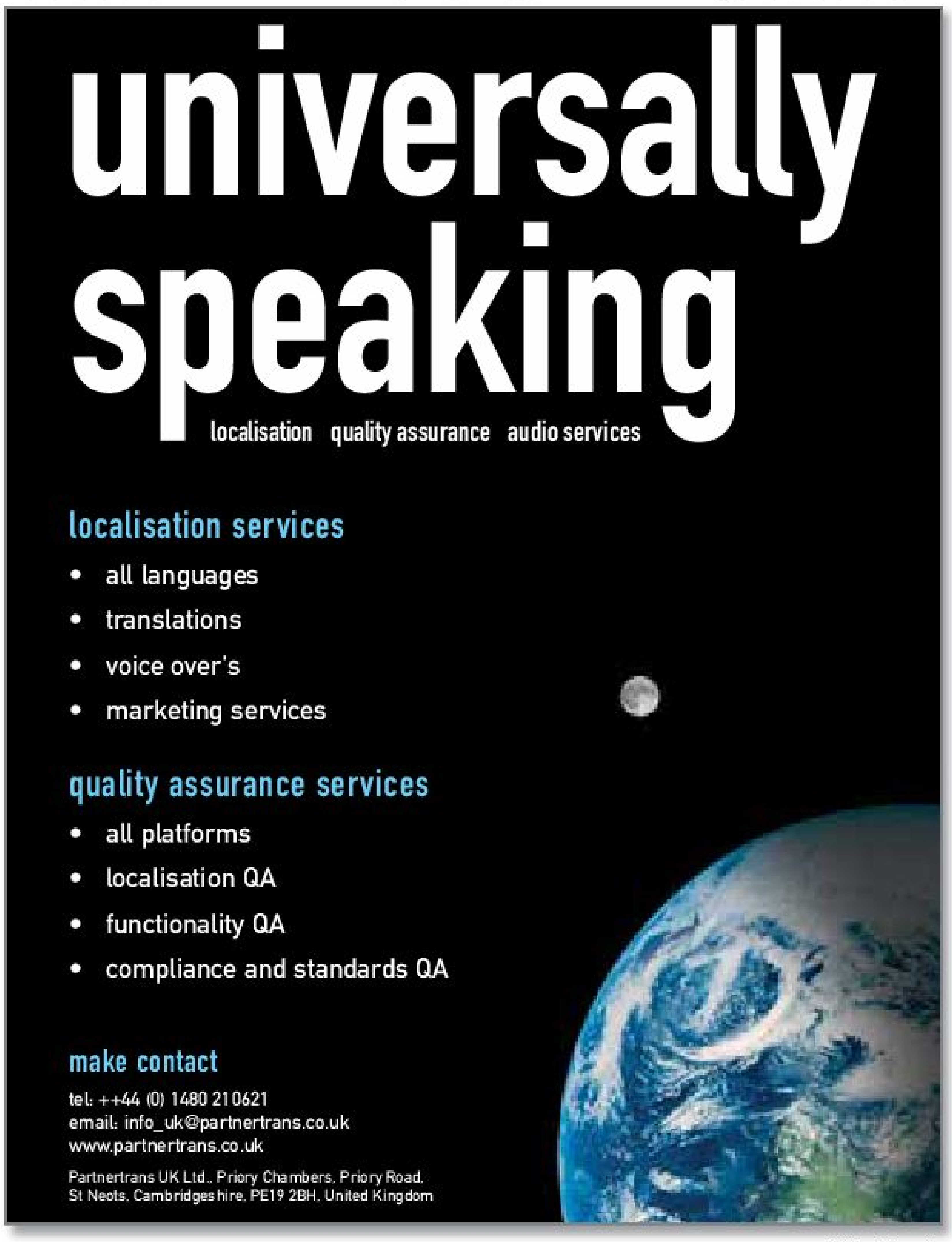

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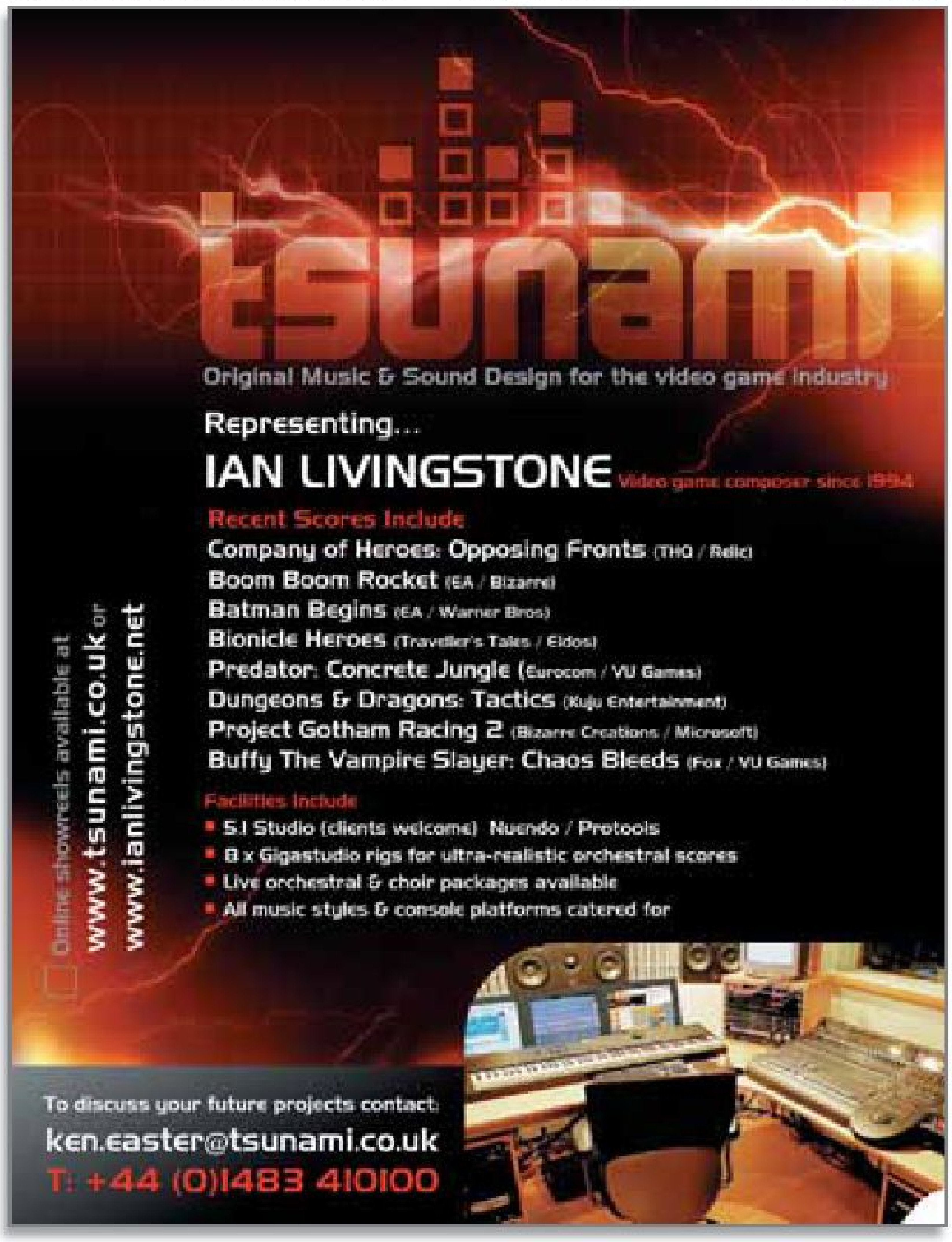

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Recent work:
- *Pokemon: Battle Revolution*, *Driver: Parallel Lines*, *Test Drive: Unlimited*

Upcoming titles:
- *Battlefield Heroes*, *Wii Fit*, *Far Cry 2*

Nimrod may sell itself as an audio company for the games industry, but its actual roster of services is far more impressive than you might initially expect.

In addition to providing music composition – and with 60 titles accounting for over 50 million sales, that's a service that shouldn't really be relegated to an 'in addition' – the company also offers a music supervision service, able to call upon the talents of former Island Records president Marc Marot, whose work on *Lock Stock and Two Smoking Barrels* and the four million-selling *Notting Hill* soundtrack speaks for itself. The service aims to help clients 'create a music brief that is culturally significant, and ensure that the process of realising the soundtrack is carried out to the highest standards possible.'

Also, rather than hire an outside orchestra for recording of its in-house compositions, Nimrod has it's own – the first specifically assembled for the games industry. Its session players have performed on huge scores such as *Star Wars* and *Harry Potter*, and can scale from anywhere between a 90 piece orchestra to a smaller quartet arrangement. Given those last two movies mentioned, it's worth a quick aside to mention that its orchestra director has the astoundingly appropriate name Jon Williams – no doubt as skilled as his Hollywood counterpart, of course.

Rather licence the music for your game? Handily, Nimrod can utilise its music industry A&R connections to get 'highly competitive rates' on a wide range of music. Or, if authenticity isn't critical to your game, the studio specialises in creating sound-alikes, recreating famous tracks of the past and present and composing 'pastiche tracks' that convey the same feeling as the original but at a fraction of the cost. And you just don't just have to take their word for it either: their sound-alike work on the *Reservoir Dogs* video game earned them a BAFTA nomination.

But perhaps most interesting is its localisation and 'culturisation' service, originally created through contact with Japanese developers and publishers looking to develop titles that would appeal to all audiences. The company works together with The Mustard Corporation to ensure clients' games are acted, recorded and translated with the authenticity and care they deserve.

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Training News

SPECIAL REPORT: Inside Frontier's inaugural Open Day

Three or four years ago it would have been possible to count on one hand the number of British developers that threw their doors open for students to mill about and discover more about the game development environment – in fact, even Terry Nutkins would have had a couple of fingers spare. Fast forward to 2008 and, while it's certainly not approaching a majority, there are more and more studios holding Open Days.

One of the latest to do so is Cambridge-based Frontier Developments, currently hard at work on ambitious next-gen political thriller *The Outsider*, WiiWare launch title *Lost Winds* and the top-secret new game in the *Elite* series.

"We've already got good links with several universities," explains Frontier MD David Walsh. "Obviously, being so near, we've got good links with Cambridge – a large number of our programmers are from there, and David does a talk there every year. Similarly we've got very good links with Bournemouth University, which is almost like the national centre for animation."

Often they would be approached by students at university open days about the possibility of having a look around the studio, and after several of these ad-hoc days it occurred to Frontier's upper echelons that a more structured approach may suit both students and the studio better. But while the company knew that demand would be high, it didn't quite realise how many would be desperate to get their foot inside a working games developer.

"We contacted all of the games courses we could think of and asked if they wanted to come," Walsh continues. "We figured it'd be oversubscribed, but we were surprised to end up with six times more applicants than positions. So we had to do some sort of selection process, which has been quite similar to our screening process for CVs. It's a recruitment event for us, basically, but the students learn a huge amount too."

The day was split into three tracks – art/animation, programming and design – with each programme consisting of five sessions educating the visitors about Frontier's processes, technology and even topics such as inter-disciplinary communication. One session that *Develop* observed saw three lucky design students get the chance to grill design legend David Braben for an hour about topics as wide ranging as piracy, new distribution methods and, well, *Bioshock*.

Says Walsh: "The idea was to minimise the amount of time that the students are sat being lectured to and maximise the time they're out in the studio actually talking to the people that make the games, so that they can get a sense of what it's like to be here and work in the industry."

www.frontier.co.uk

FULL SAIL BECOMES UNIVERSITY

Full Sail Real World Education, the Florida-based digital media school, has been granted the right to change its name to Full Sail University.

The university currently offers 13 degree programmes, including one in game development. It hopes that by changing its name it will gain more credibility.

"In the hierarchy of education institutions, there are schools, there are colleges and there are universities," Full Sail president Garry Jones told the Orlando Sentinel.

"A university title denotes the highest rung. There is a certain amount of prestige and pride that comes with the name. You have to earn the distinction of being a university and you have to do it by having a long track record of being an institution in good standing and having graduates that you can qualitatively prove are successful."

Full Sail has also simultaneously unveiled a 1,700 foot-long Hollywood-style studio backlot, designed to give students experience of working in a real movie facility. It includes 18 facades, including a recreation of New York's Times Square.

www.fullsail.com

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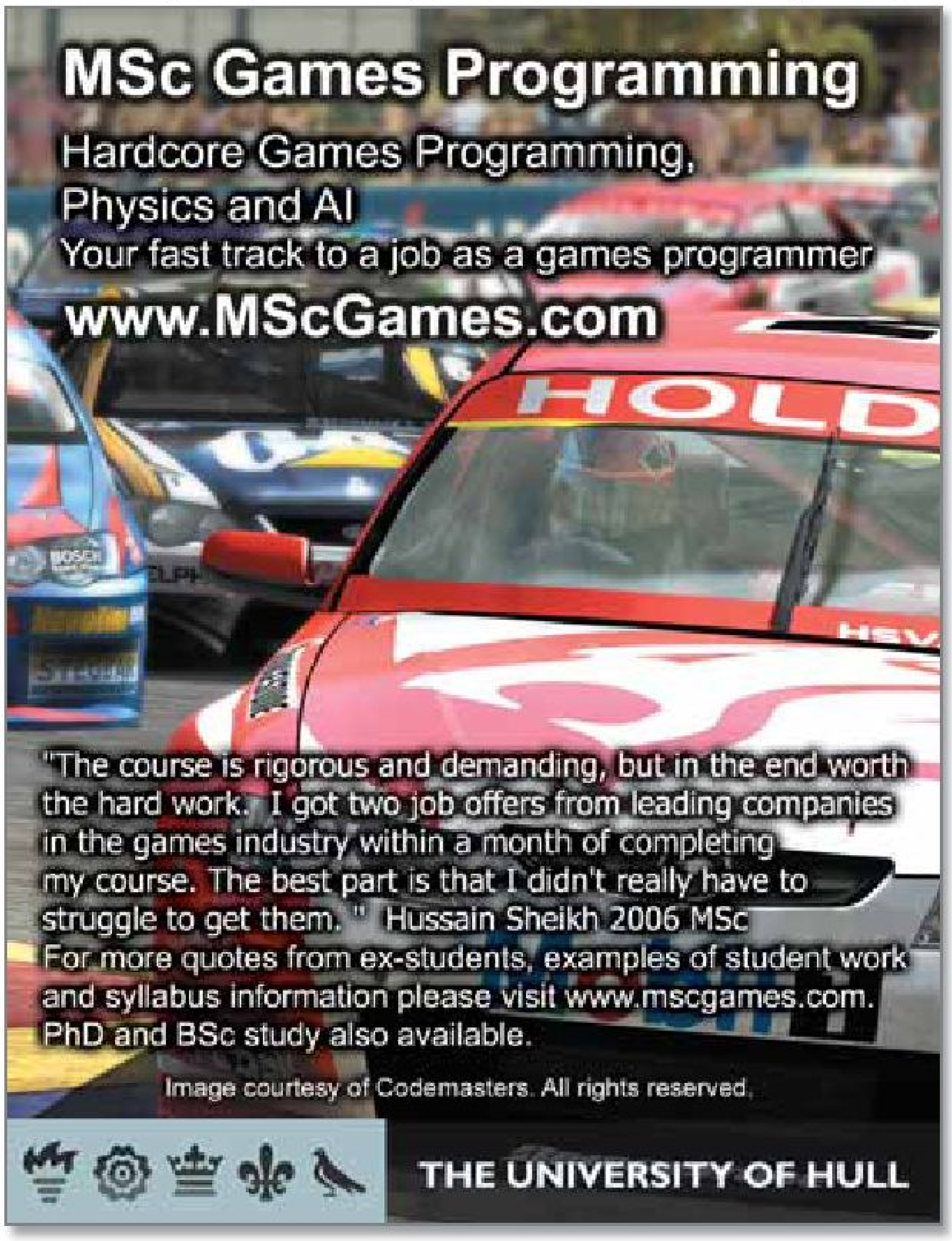

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For more quotes from ex-students, examples of student work and syllabus information please visit www.mscgames.com.
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THE UNIVERSITY OF HULL

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Games Grads

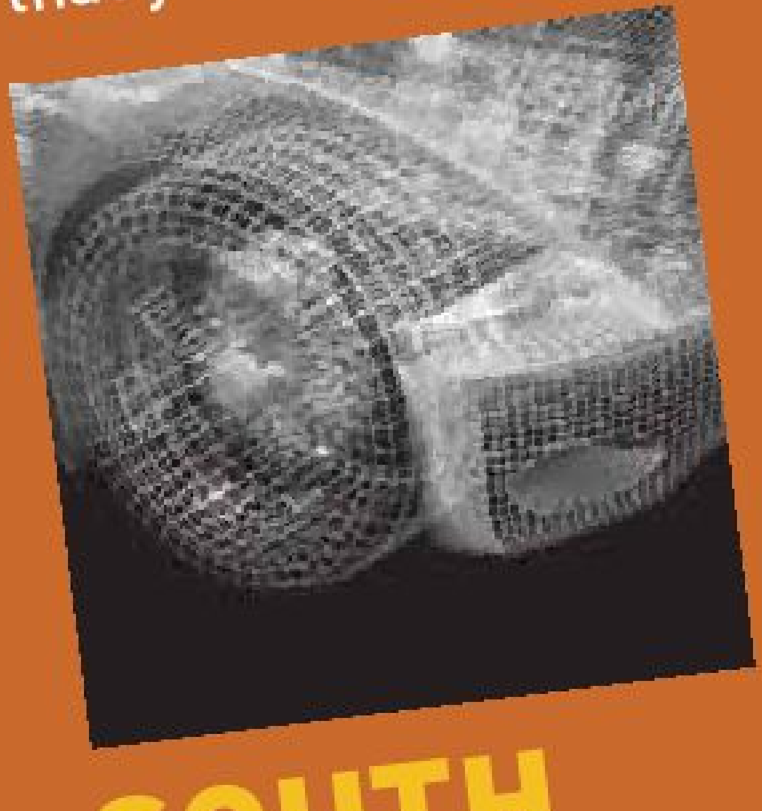
FOR A CAREER IN GAMES

Games Grads is a career fair especially designed for degree course students who are looking for a career in computer and video games development. It's your chance to get in front of the industry's leading companies and studios to find out what jobs are on offer.

New for 2008 - A comprehensive series of seminars will sit alongside this year's events, giving practical, real life advice on how to get into the industry and just what to expect when you're there.

It's free to attend, so register online now and make sure you grab your opportunity!

Some of the biggest names will be there to recruit, so don't miss out on your chance to show them that you've got what it takes to be part of their team!



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THE BYRONIC MAN

Simon Byron reviews the newspaper reviews of the Byron Review…

With a nickname like 'Slug' there was never any doubt it would end in tears. One wonders what Steve 'Slug' Russell – inventor of *Space War* – must think these days when he looks at the morning papers. The industry he's commonly credited for starting is nowadays blamed for all sorts of society's ills.

From the headlines over the last few years, you'd be forgiven for thinking that the world's full of kids murdering each other, having become so desensitised to violence that they can't comprehend that a claw-hammer in the back of the head or bullets through classmates isn't really a socially responsible way of dealing with angst. In my day, we used to listen to the Sister of Mercy. A generation before, they'd read *Catcher In the Rye*, a book so boring you end up killing beatles for kicks.

Hang on: also according to the papers, they're all massive lard-arses, fused to their sofas through years of inactivity. If they're all so fat, how come they're so dangerous? Again, when I was younger, the chubby ones were quite rightly ridiculed. They looked funny, were easy to bully and had small penises.

The media don't know what to make of us. Or, more importantly, they want to create a crisis. We buy more papers when there's stuff to worry about. So when something as important as the Byron Review comes along, did we really expect a fair go?

We all know kids shouldn't play 18-rated videogames, in the same way that we know kids shouldn't drink, sniff glue or watch *The X Factor*. But that didn't stop some papers illustrating their Byron Review pieces with images of kids posed playing *Grand Theft Auto*. Given we're so concerned about our children playing games they're not supposed to, shouldn't these papers be reported to the Social Services? When they run pieces on under-age sex, they don't accompany this with two children performing blowjobs, do they?

> **"We all know kids shouldn't play 18-rated games. But that didn't stop newspapers illustrating their Byron Review pieces with images of kids playing GTA…"**

Other papers pulled out stock photos. Kids posing with game controllers, captions reading: 'Harmful: A Government-commissioned report says that games can desensitise children to violence.' The picture's literally from last century; the kid's playing *Mario Kart 64*. An absolute despicable shocker of a game, we all agree. After all, Gamespot only gave it 6.4 out of 10.

Of course, of course: it was *The Mail* that wheeled out the big guns to highly gaming's perils. Sorry, "big guns" is harsh – she's lost a lot of weight, to be fair. Anne Diamond, who once suggested that the fall of the Berlin Wall was good because it meant the East Germans could down use better shops, was asked to appraise a random selection of video games in order to warn middle England of the terrible perils.

Seemingly avoiding picking titles from the celebrated historical study *Game On! From Pong To Oblivion – The 50 Greatest Videogames Of All Time* – Google it – Diamond instead headed down to a local underground game store, which specialises, clearly, in selling only violent games.

So instead of *Ocarina of Time* or *Final Fantasy VII*, she picked up chart-toppers such as *Scarface* (2006) and *Dead or Alive 4* (2005) – if nothing good came out of the Byron Review, publishers of those games will no doubt thank Tanya Byron for the extra revenue. Anne's reviews were punctuated by comments from her under-age kids, highlighting the fact she's part of the problem. Next week: Anne Diamond gets her children pissed and writes about it! The week after, she shows them some porn! The week after, they play computer games and fuck each other to death.

Being shot in *Call of Duty 4*, Diamond claimed, felt "pretty real." The penultimate line in her *Resident Evil 4* appraisal was: "When I played, I was stabbed to death with pitchforks amid fountains of my own blood." If only, if only.

Of course, this isn't the first time Diamond has blurred the line between fantasy and reality – she presented a TV show with a puppet rat, for a start. For all the journalistic merit, *The Mail* may as well have invited God himself to review a random selection of videogames, before hopping online to slag off n00bs on Xbox Live.

So what has this media storm in a teacup proved? Nothing, really. The video games industry is wholly responsible; the newspapers enjoyed inflating the Byron Report findings. Headlines fade and will be forgotten until the next scapegoat arrives. It's the cycle of life, unless you're that goat handpicked by Sony to promote *God of War 3*.

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develop FORWARD PLANNER

MAY 2008

Publication date: May 3rd
BUILD Feature: Networking
BUILD Guide: Game engines

JUNE 2008

DEVELOP AWARDS: THE FINALISTS ARE REVEALED
Publication date: June 10th
BUILD Feature: Physics
BUILD Guide: AI
Events: Paris GDC, GameHorizon

JULY 2008

DEVELOP CONFERENCE AND EXPO – SPECIAL ISSUE
Publication date: July 8th
BUILD Feature: Procedural content tools
BUILD Guide: Game audio

AUGUST 2008

Publication date: August 12th
BUILD Feature: 3D modelling
BUILD Guide: UI Engines
Event Distribution: GCDC

SEPTEMBER 2008

ASIAN DEVELOPMENT MARKETS – SPECIAL ISSUE
Publication date: September 8th
BUILD Feature: User interface tools
BUILD Guide: MMOG Engines

OCTOBER 2008

Publication date: October 6th
BUILD Feature: Face/body graphics
BUILD Guide: 3D modelling

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Glowfrog Studios retouch and CGI teams worked with model Kayleigh Dunlop to produce the 'creative modelling' image, retouching the studio photography to match the fully realized 3D digital set. With creative direction by Nigel Hunt, our team created the shot using Autodesk® 3ds Max® before final compositing.

"Delivering high quality work in breakneck time requires that our production pipeline can handle multiple VFX, visualisation and compositing projects simultaneously. bluegfx is our 'go to' company for all our systems, software and support"

Nigel Hunt, Director, Glowfrog Studios | www.glowfrog.com

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